

COMMERCE AND INDUSTRY

LAND USE: CONDITIONS AND TRENDS

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REPORT CONTAINING BACKGROUND IN-
FORMATION FOR THE COMMERCE AND
INDUSTRY ELEMENT OF THE COMPRE-
HENSIVE PLAN OF SAN FRANCISCO •
PREPARED BY THE SAN FRANCISCO
DEPARTMENT OF CITY PLANNING



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LAND USE: CONDITIONS AND TRENDS

Report containing background information for the Commerce and Industry Element of the Comprehensive Plan of San Francisco.

Prepared by the San Francisco Department of City Planning in conjunction with the Office of the Mayor, Economic Analysis Unit.

October, 1975

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Land use : conditions
and trends : report
1975.

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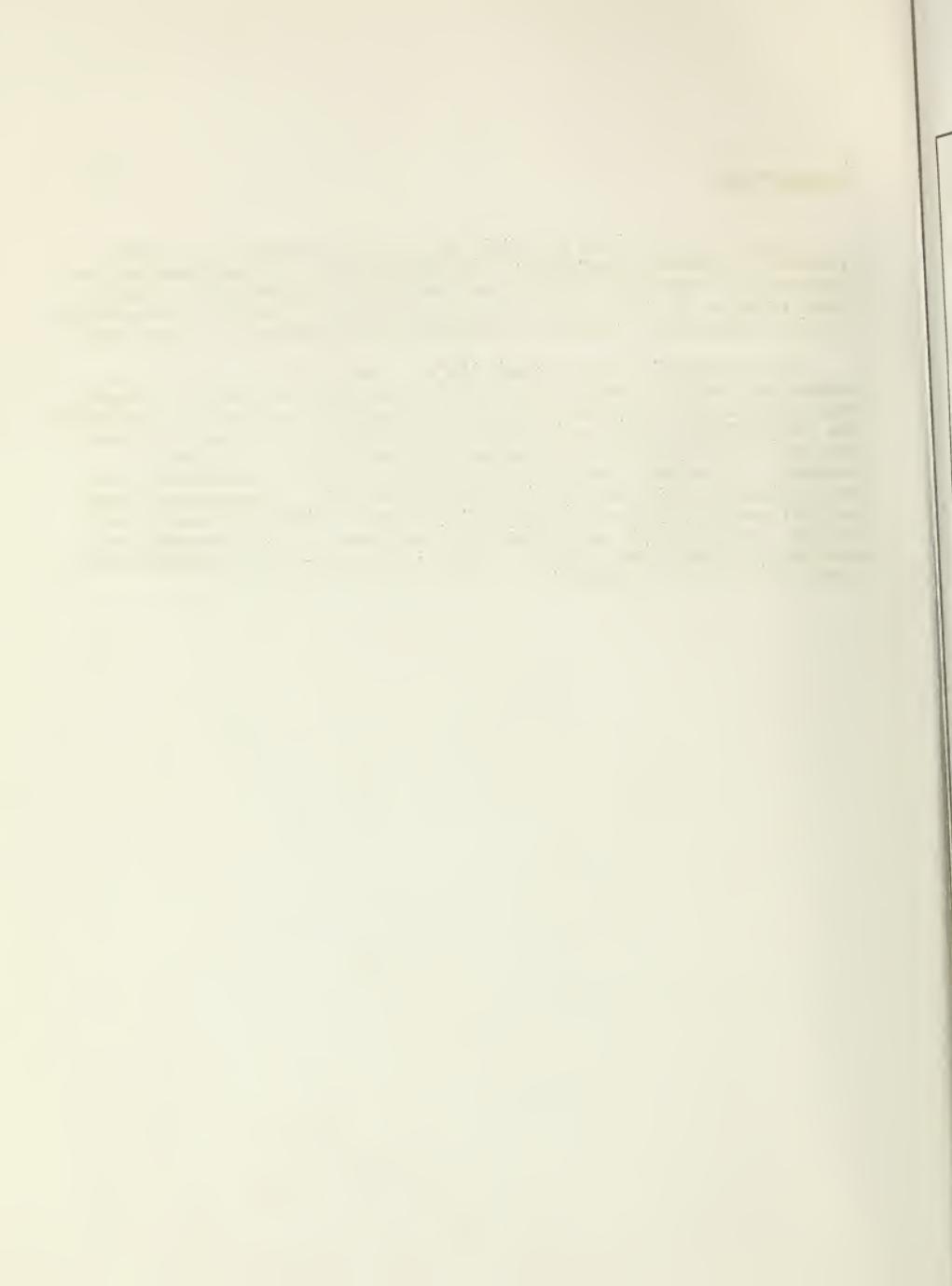
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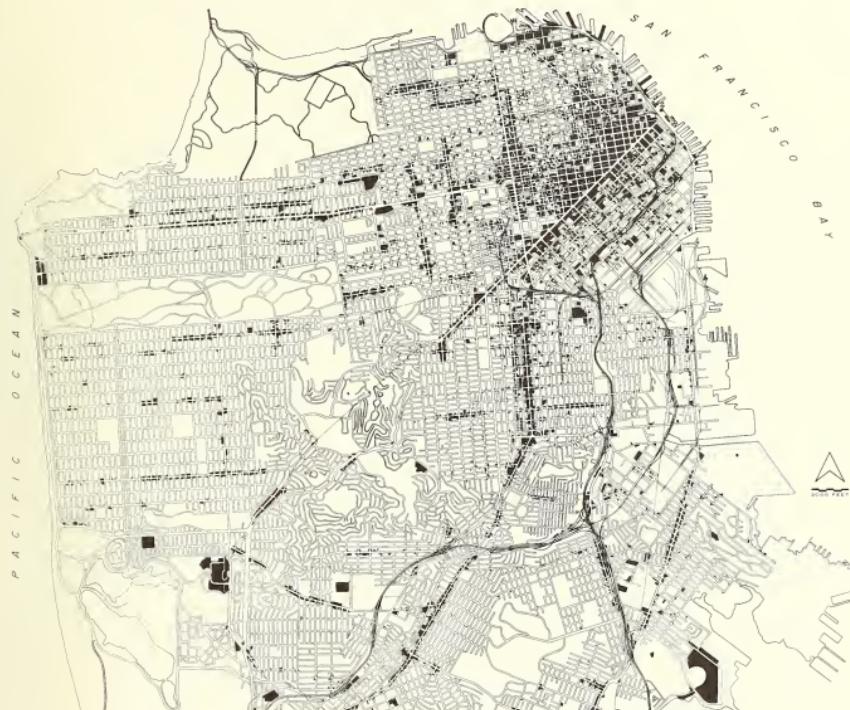
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INTRODUCTION

This report is one of a series by the Department of City Planning to provide background information for preparation of the Commerce and Industry Element of the City's Comprehensive Plan. Other reports in the series concern Industrial Trends, Labor Force Trends, Commercial Trends and Neighborhood Commercial Districts.

The purpose of this report is to supply data, relative to commercial and industrial land use, which can be used at a later date to establish planning policy for certain sections of the city. The information deals with both the location and amount of land used by the commercial and industrial sectors of the city's economy. It covers the eastern one-third of San Francisco, the section containing most of the larger and more concentrated commercial and industrial land uses as shown on the four maps that follow. Information on commercial land use in the downtown and outside of this study area is being published in the Neighborhood Commercial Districts report.

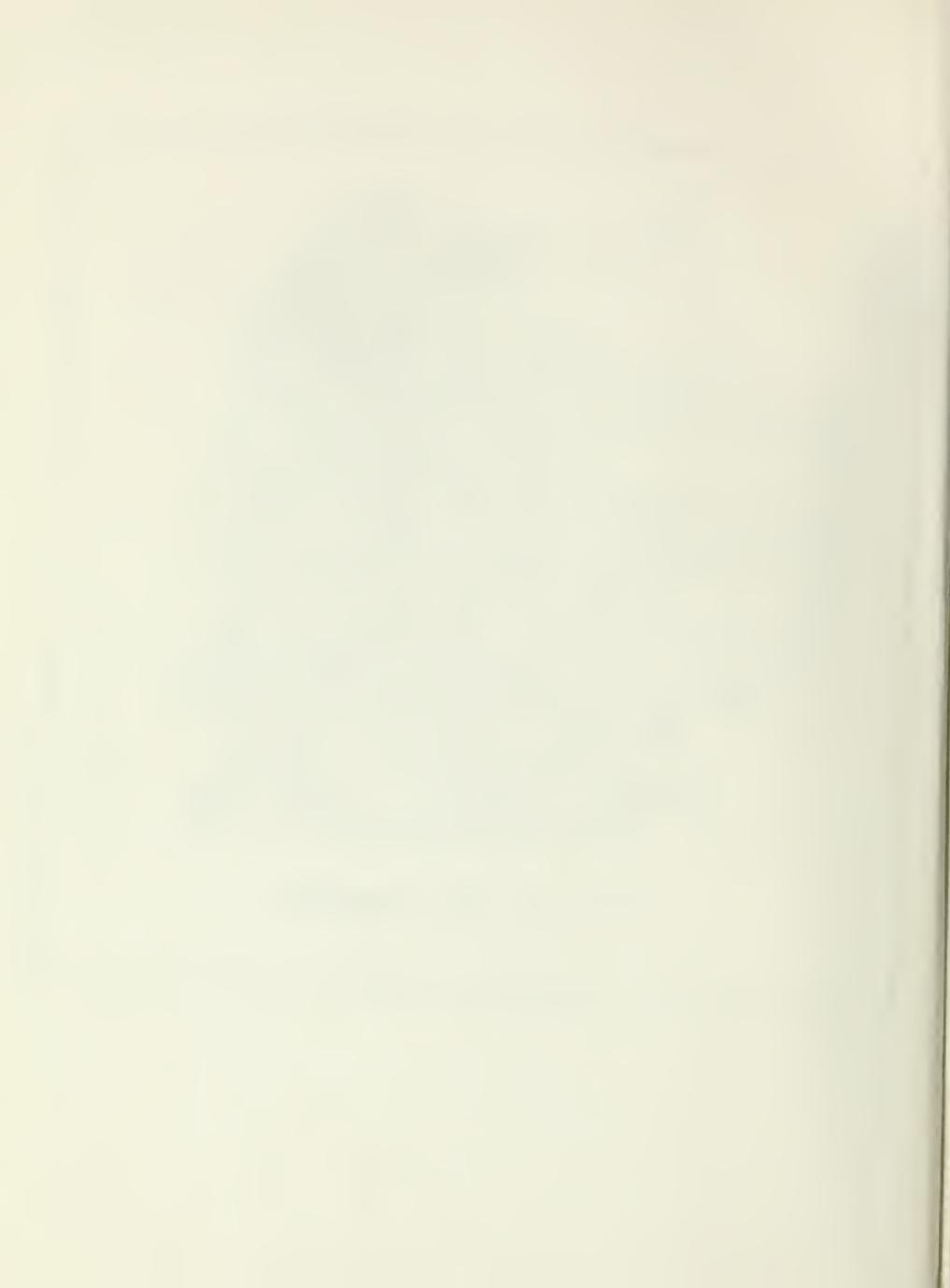


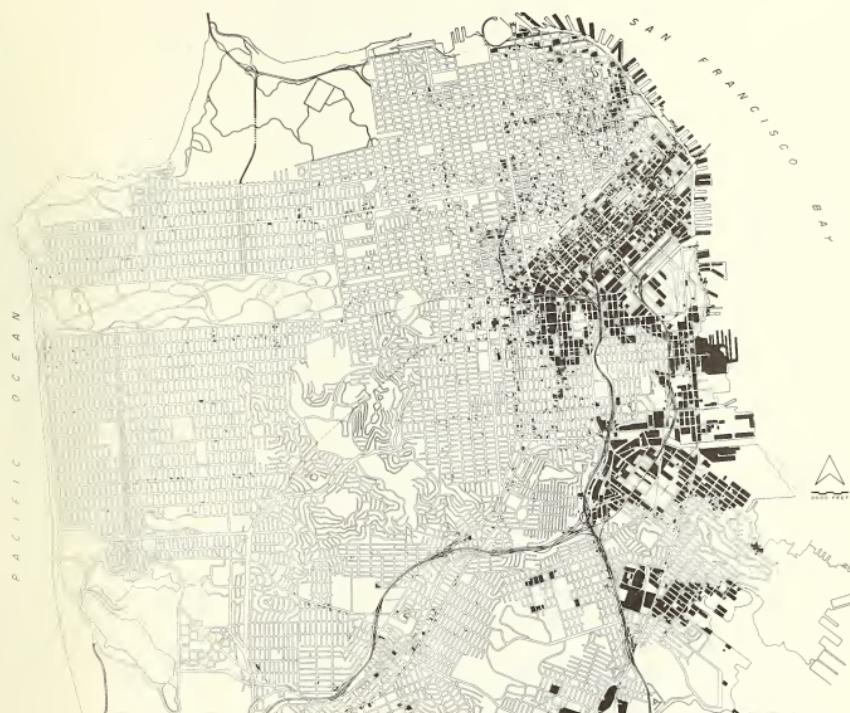


LAND USED FOR COMMERCE

SOURCE 1970 LAND USE SURVEY

PREPARED BY THE SAN FRANCISCO DEPARTMENT OF CITY PLANNING

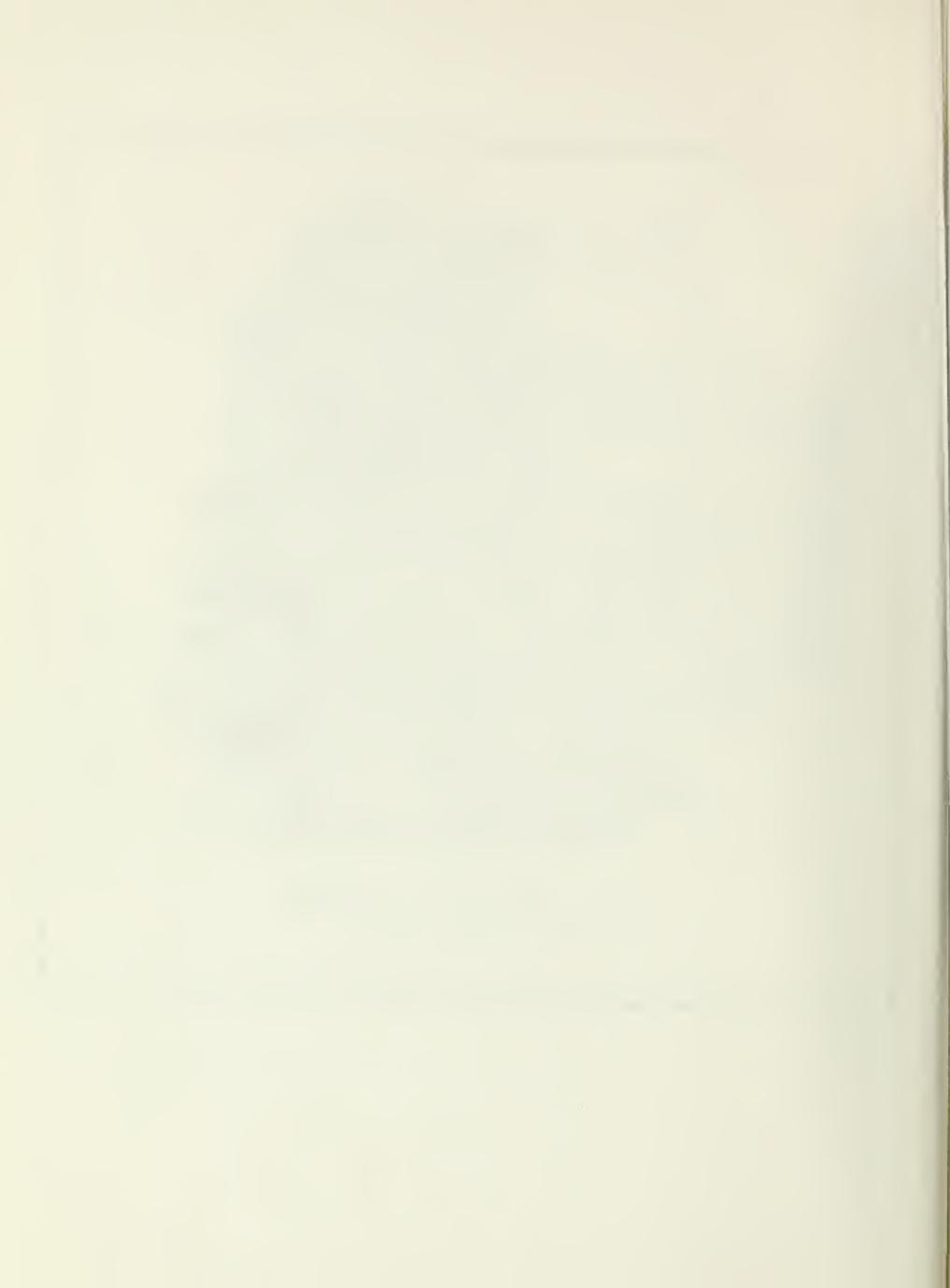




LAND USED FOR INDUSTRY

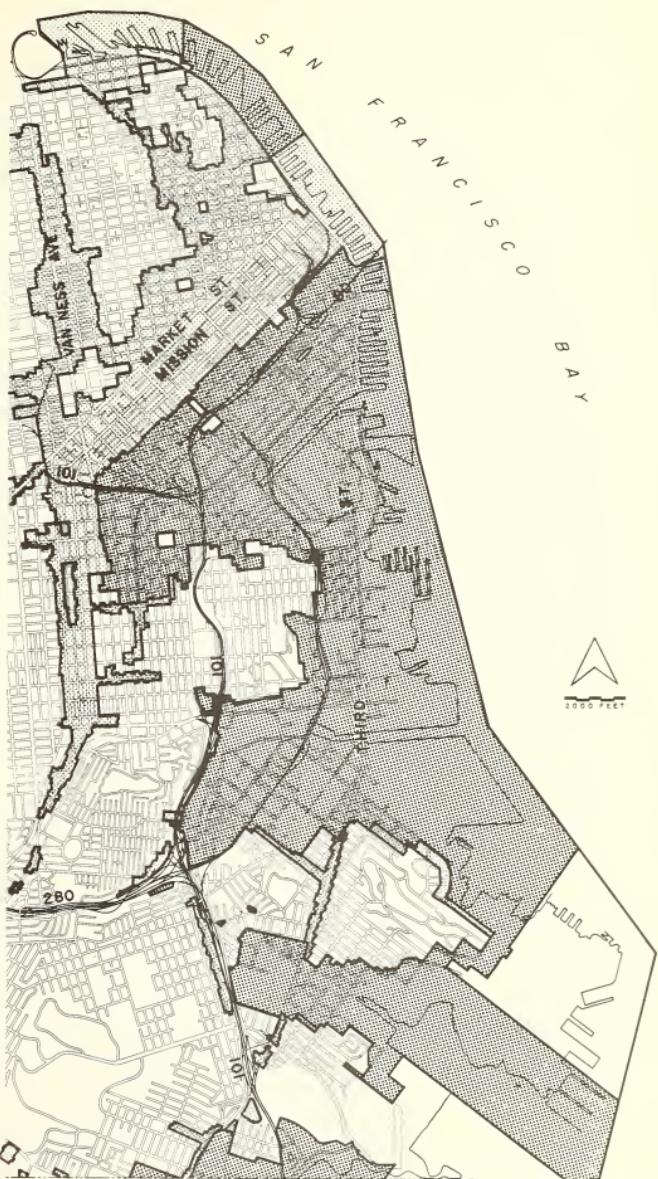
SOURCE 1970 LAND USE SURVEY

PREPARED BY THE SAN FRANCISCO DEPARTMENT OF CITY PLANNING



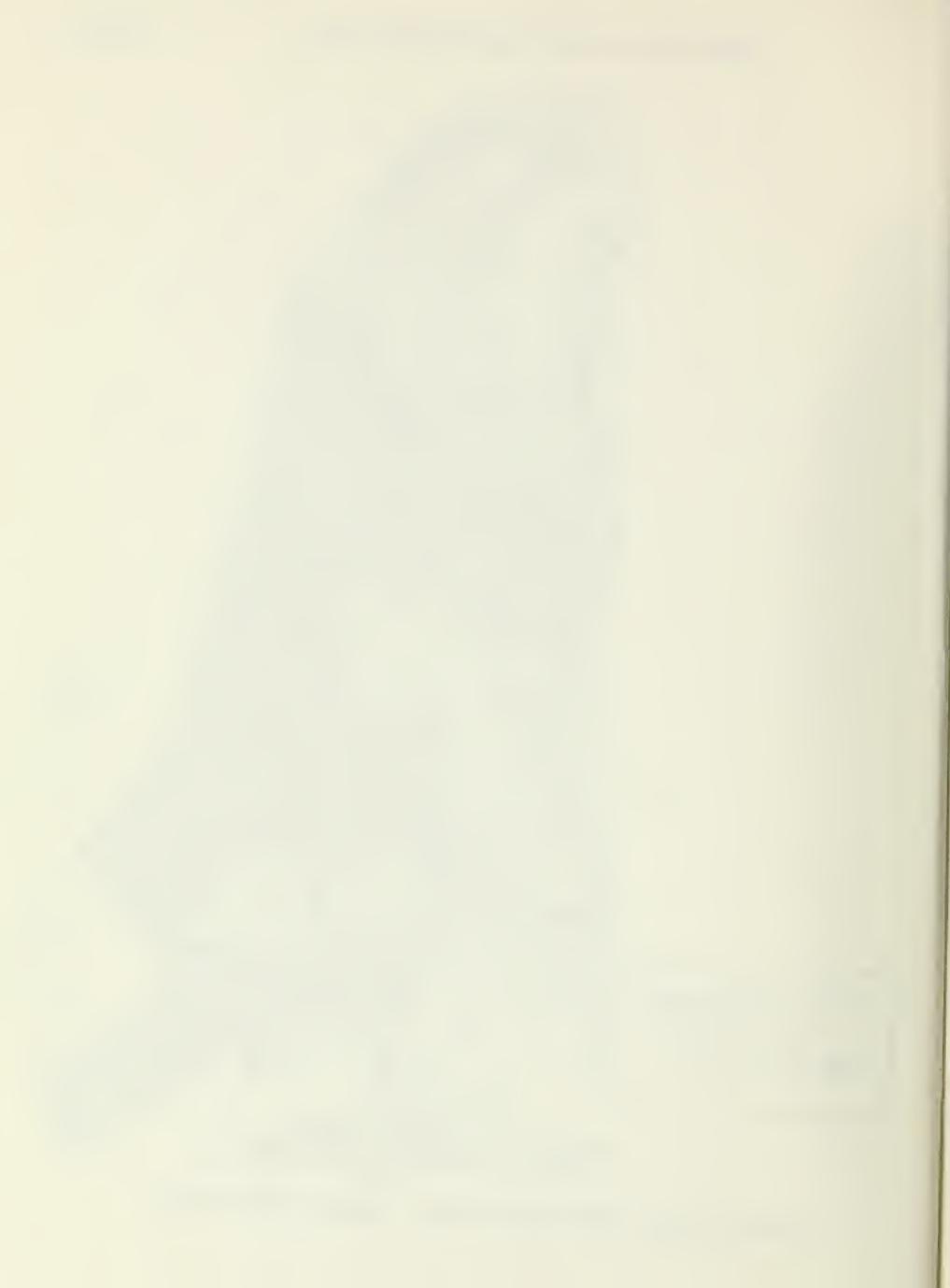
Major Commercial and Industrial Area

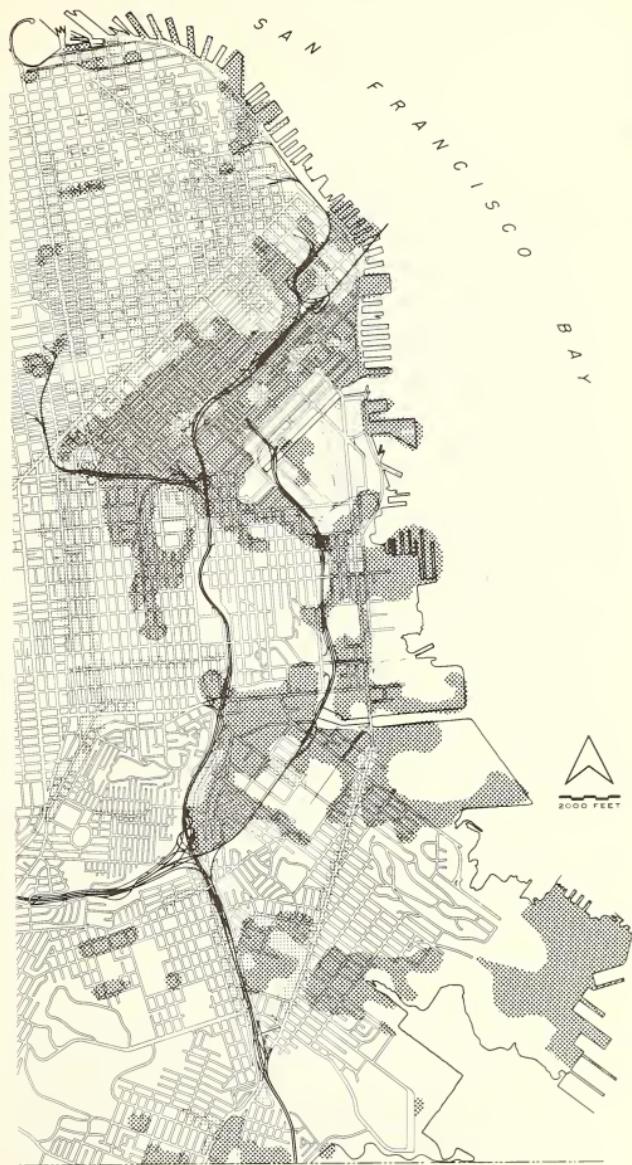
Map I



Source: City Planning Code

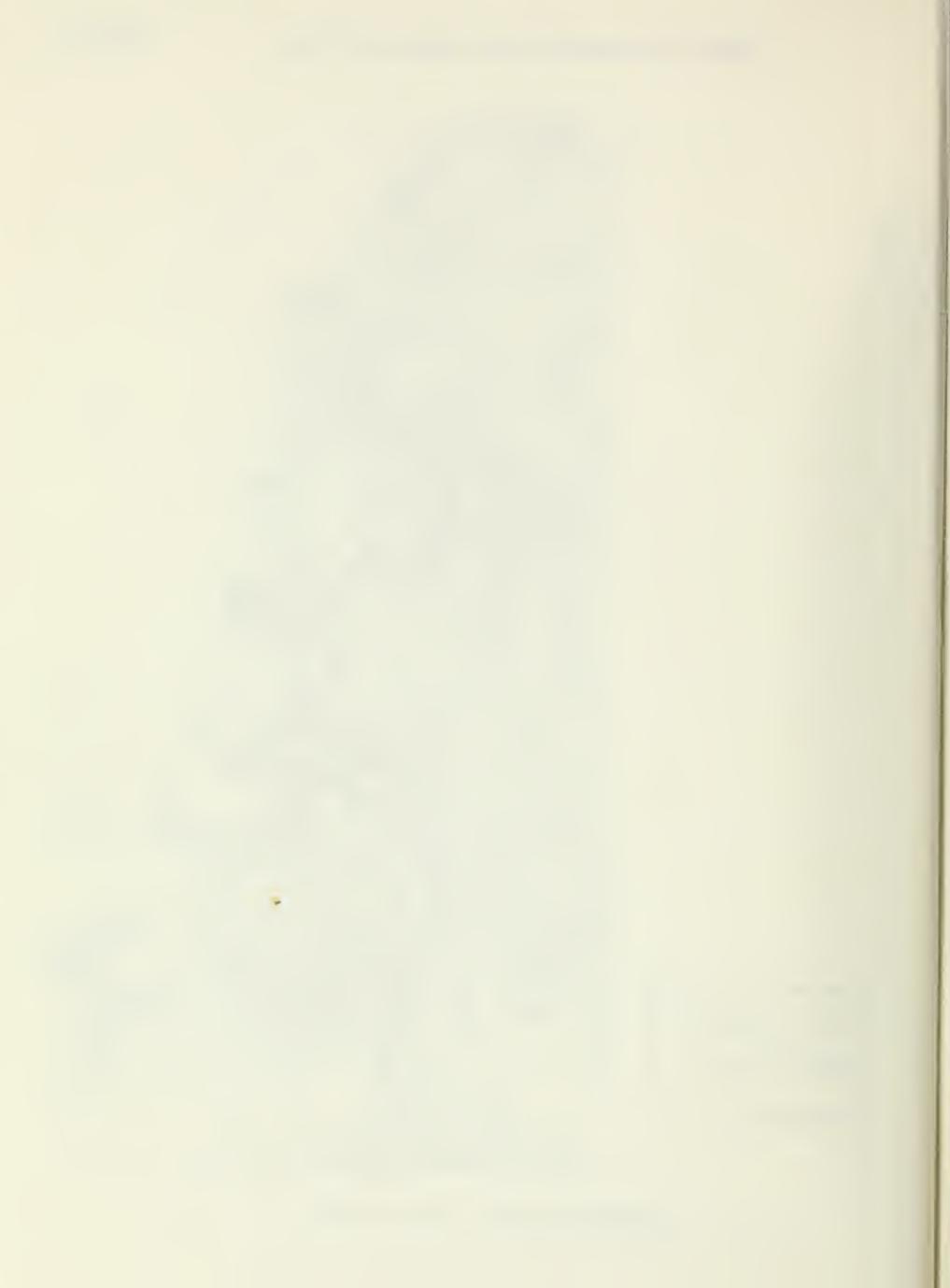
COMMERCIAL AND INDUSTRIAL ZONING DISTRICTS





Source: 1970 Land Use Survey,
Department of City Planning

GENERALIZED LAND USE



I. LOCATIONS OF LAND USES

The 1970 Land Use Survey conducted by the Department of City Planning was an inventory of all land-use activity in San Francisco. Every parcel of land was inventoried as to lot size, the primary ground-floor land use occupying the parcel, and secondary land uses. Uses were classified according to the Standard Industrial Classification (SIC) Manual of the United States Bureau of the Budget. This classification system was expanded and modified in certain ways for purposes of the survey. The following list contains the major group classifications of commercial and industrial land uses as discussed in this report:

Agriculture, Forestry and Fisheries:

Major Group 01. Agricultural production
Major Group 07. Agricultural services and hunting and trapping
Major Group 08. Forestry
Major Group 09. Fisheries

Mining:

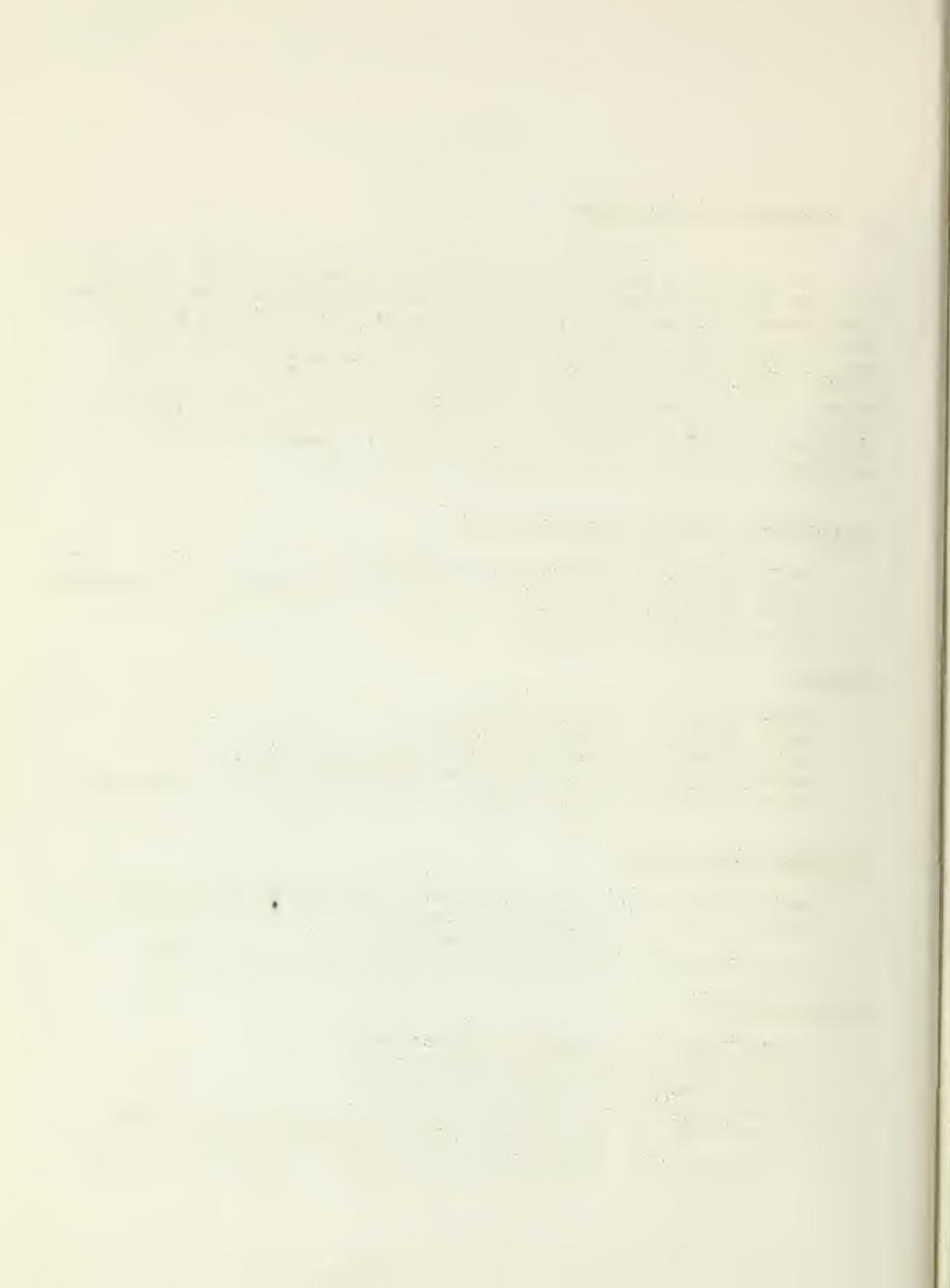
Major Group 10. Metal mining
Major Group 11. Anthracite mining
Major Group 12. Bituminous coal and lignite mining
Major Group 13. Crude petroleum and natural gas
Major Group 14. Mining and quarrying of nonmetallic minerals, except fuels

Contract Construction:

Major Group 15. Building construction-general contractors
Major Group 16. Construction other than building construction-general contractors
Major Group 17. Construction-special trade contractors

Manufacturing:

Major Group 19. Ordnance and accessories
Major Group 20. Food and kindred products
Major Group 21. Tobacco manufactures
Major Group 22. Textile mill products
Major Group 23. Apparel and other finished products made from fabrics and similar materials
Major Group 24. Lumber and wood products, except furniture



Manufacturing (cont.)

- Major Group 25. Furniture and fixtures
- Major Group 26. Paper and allied products
- Major Group 27. Printing, publishing, and allied industries
- Major Group 28. Chemicals and allied products
- Major Group 29. Petroleum refining and related industries
- Major Group 30. Rubber and miscellaneous plastics products
- Major Group 31. Leather and leather products
- Major Group 32. Stone, clay, glass, and concrete products
- Major Group 33. Primary metal industries
- Major Group 34. Fabricated metal products, except ordnance, machinery, and transportation equipment
- Major Group 35. Machinery, except electrical
- Major Group 36. Electrical machinery, equipment, and supplies
- Major Group 37. Transportation equipment
- Major Group 38. Professional, scientific, and controlling instruments; photographic and optical goods; watches and clocks
- Major Group 39. Miscellaneous manufacturing industries

Transportation, communication, electric, gas, and sanitary services:

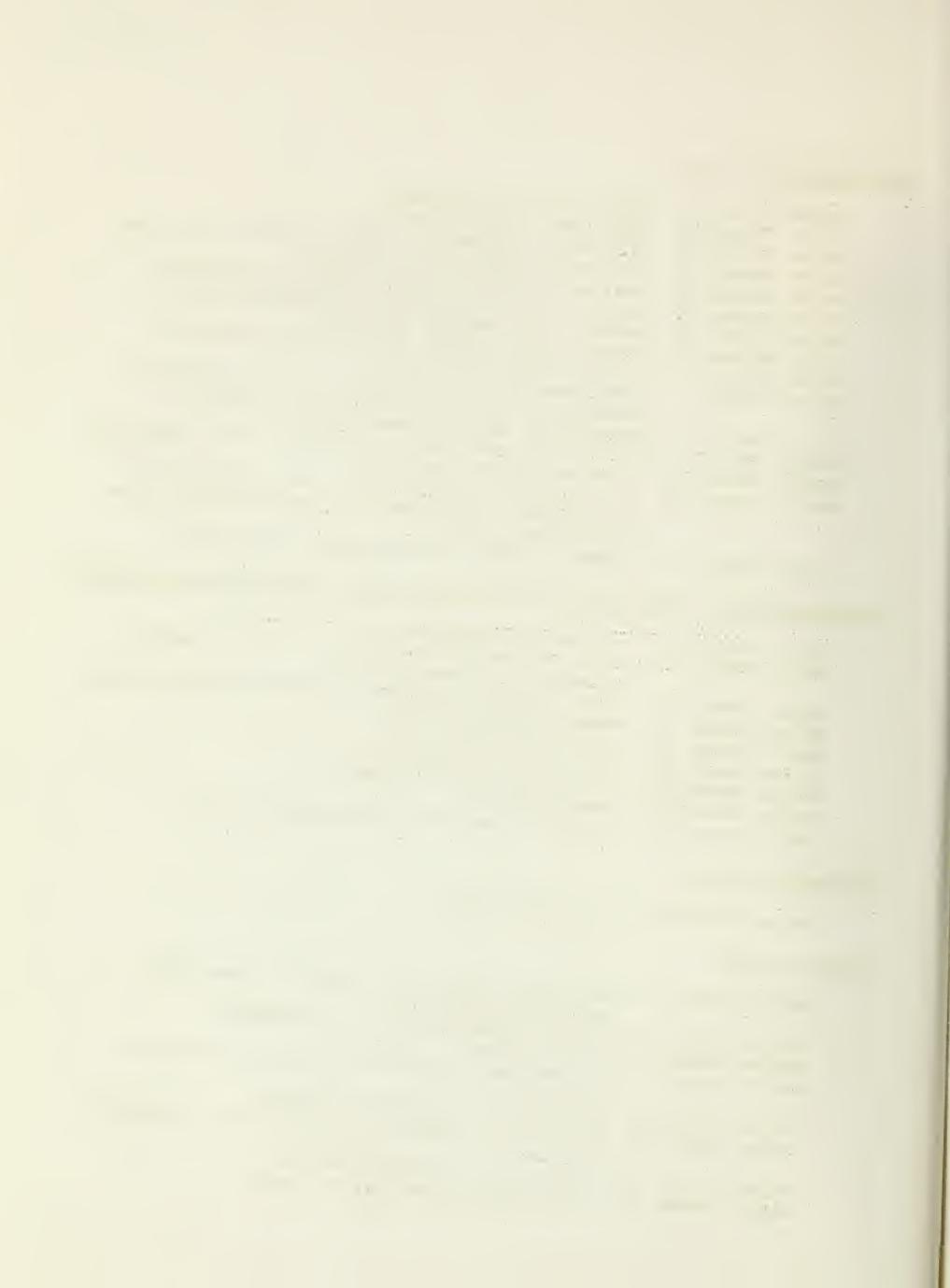
- Major Group 40. Railroad transportation
- Major Group 41. Local and suburban transit and interurban passenger transportation
- Major Group 42. Motor freight transportation and warehousing
- Major Group 44. Water transportation
- Major Group 45. Transportation by air
- Major Group 46. Pipe line transportation
- Major Group 47. Transportation services
- Major Group 48. Communication
- Major Group 49. Electric, gas, and sanitary services

Wholesale trade:

- Major Group 50. Wholesale trade

Retail trade:

- Major Group 52. Building materials, hardware, and farm equipment dealers
- Major Group 53. Retail trade--general merchandise
- Major Group 54. Food stores
- Major Group 55. Automotive dealers and gasoline service stations
- Major Group 56. Apparel and accessory stores
- Major Group 57. Furniture, home furnishings, and equipment stores
- Major Group 58. Eating and drinking places
- Major Group 59. Miscellaneous retail stores



Finance, insurance, and real estate:

- Major Group 60. Banking
- Major Group 61. Credit agencies other than banks
- Major Group 62. Security and commodity brokers, dealers, exchanges, and services
- Major Group 63. Insurance carriers
- Major Group 64. Insurance agents, brokers, and service
- Major Group 65. Real estate
- Major Group 66. Combinations of real estate, insurance, loans, law offices
- Major Group 67. Holding and other investment companies

Services:

- Major Group 70. Hotels, rooming houses, camps, and other lodging places
- Major Group 72. Personal services
- Major Group 73. Miscellaneous business services
- Major Group 75. Automobile repair, automobile services, and garages
- Major Group 76. Miscellaneous repair services
- Major Group 78. Motion pictures
- Major Group 79. Amusement and recreation services, except motion pictures
- Major Group 80. Medical and other health services
- Major Group 81. Legal services
- Major Group 82. Educational services
- Major Group 84. Museums, art galleries, botanical and zoological gardens
- Major Group 86. Nonprofit membership organizations
- Major Group 88. Private households
- Major Group 89. Miscellaneous services

Government:

- Major Group 91. Federal Government
- Major Group 92. State government
- Major Group 93. Local government
- Major Group 94. International government

;

Tables 1 and 2 contain information about the amounts of these uses and the intensity of development for all land uses in the study area. Maps 3 through 12 illustrate the relative location of each group of land uses.

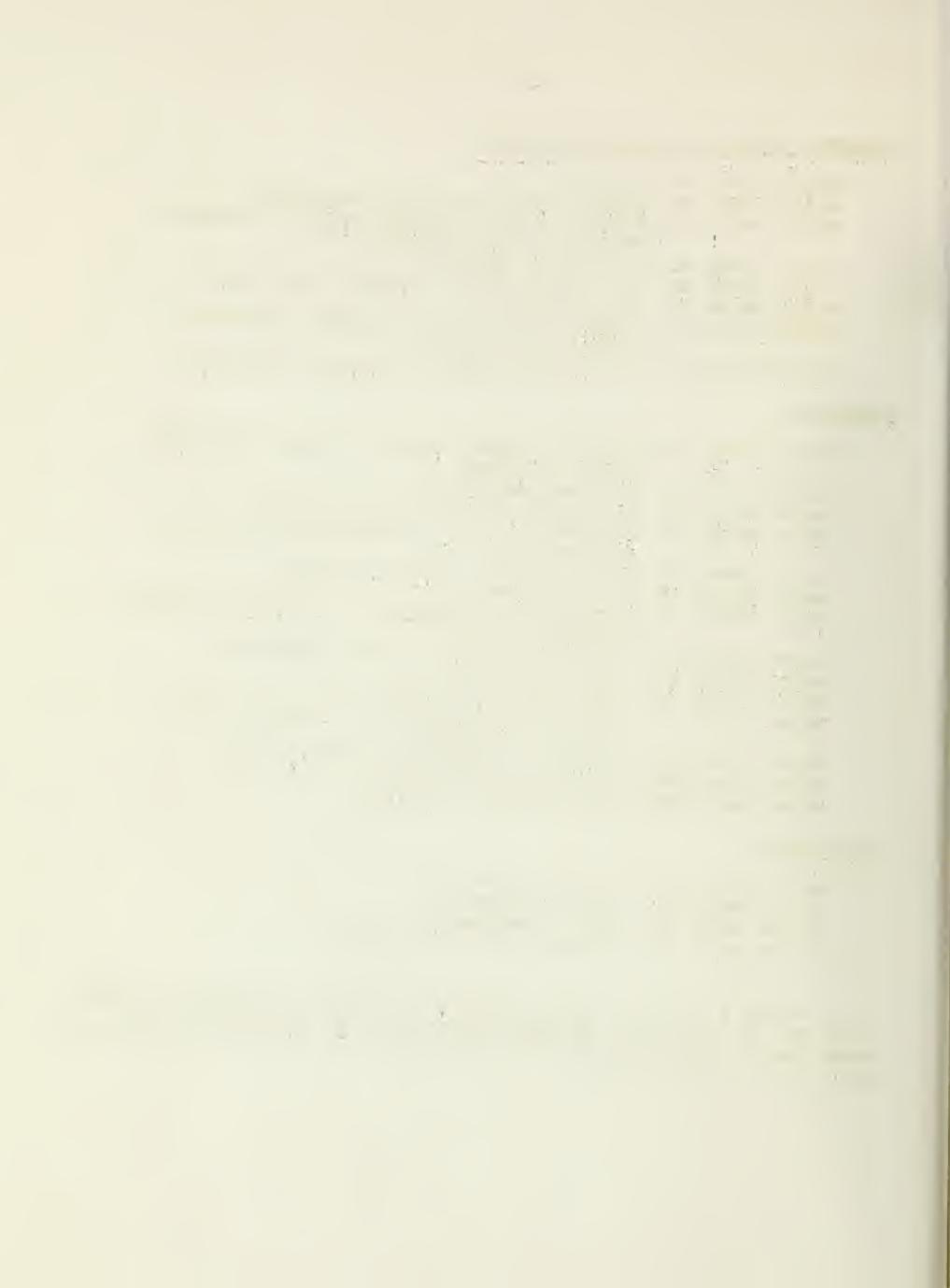


Table 1: 1970 Number of Commercial and Industrial Land Uses in Study Area (Census Tracts 101-125, 176-180, 226-234, 251, 606-610)

STANDARD INDUSTRIAL CLASSI- FICATION BY MAJOR GROUPS		ACTIVITY		SIC 1 - 9							
		General	Central or Administrative Office	SIC 10 - 14		SIC 15 - 17		SIC 18 - 39		SIC 40 - 49	
AGRICULTURE FORESTRY & FISHERIES	Number of Uses in Study Area	26	6	6	-	0	-	-	-	1	
	Percent of Citywide in Study Area	15.4%	100%	100%	-	0.0%	-	-	-	25%	
MINING	Number of Uses in Study Area	1	8	7	-	-	-	-	-	-	
	Percent of Citywide in Study Area	25%	100%	100%	-	-	-	-	-	-	
CONTRACT CONSTRUCTION	Number of Uses in Study Area	326	45	47	1	29	65	2	-	-	
	Percent of Citywide in Study Area	59.2%	50%	55.3%	100%	70.4%	91.6%	100%	-	-	
MANUFACTURING TRANSPORTA- TION, COM- MUNICATION & PUBLIC UTIL.	Number of Uses in Study Area	1,726	76	491	4	68	98	-	4	-	
	Percent of Citywide in Study Area	88.0%	88.4%	91.4%	100%	93.1%	93.3%	-	50.0%	-	
	Number of Uses in Study Area	1,064	56	174	2	17	127	0	7	-	
	Percent of Citywide in Study Area	87.9%	83.6%	97.2%	100%	85.0%	94.1%	0.0%	70.0%	-	
										Automobile Parking Open Air Use	

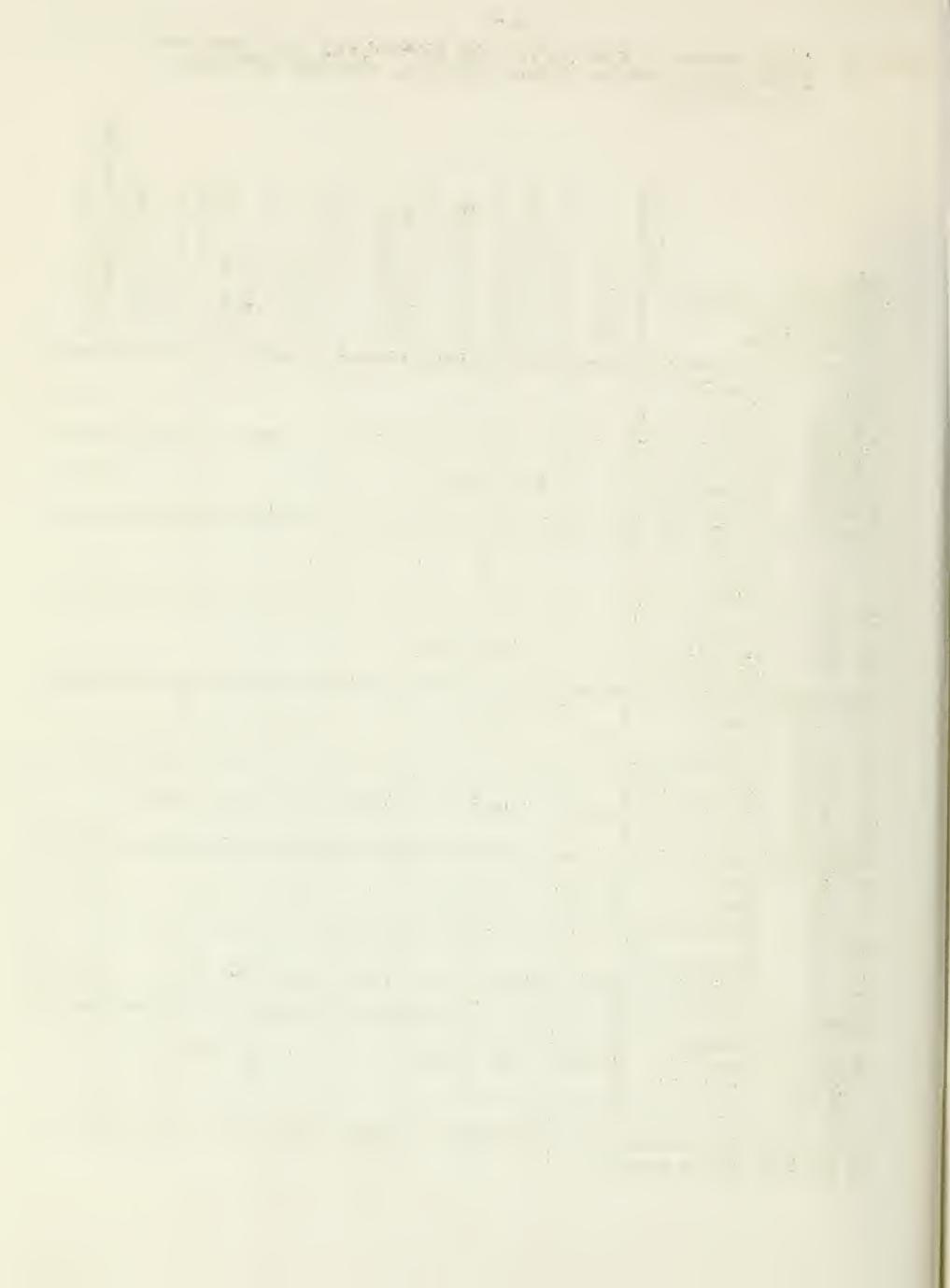


Table 1 (Continued)

STANDARD INDUSTRIAL CLASSI- FICATION BY MAJOR GROUPS		ACTIVITY		SIC 50 WHOLESALE TRADE						
				General	Central or Administrative Office	Sales Office		Research and Development		Warehouse or Storage
SIC 50 - 59 SIC 52 - 59	WHOLESALE TRADE	Number of Uses in Study Area	1,290	467	785	-	59	169	1	7
		Percent of Citywide in Study Area	88.4%	98.3%	93.6%	-	85.5%	97.1%	100%	43.7%
SIC 50 - 59 SIC 52 - 59	RETAIL TRADE	Number of Uses in Study Area	3,995	25	20	-	42	13	3	35
		Percent of Citywide in Study Area	47.2%	73.5%	66.7%	-	53.7%	39.4%	75.0%	18.5%
SIC 60 - 67 SIC 60 - 67	FINANCE, INSURANCE & REAL ESTATE	Number of Uses in Study Area	1,816	28	81	2	6	0	-	5
		Percent of Citywide in Study Area	66.1%	96.6%	84.4%	66.7%	100%	0.0%	-	13.5%
SIC 70 - 89 SIC 70 - 89	SERVICES	Number of Uses in Study Area	25,487	38	75	0	11	53	1	19
		Percent of Citywide in Study Area	17.3%	64.4%	85.2%	0.0%	73.3%	38.1%	50.0%	24.1%
SIC 91 - 93 FEDERAL, STATE & LOCAL GOVERNMENT		Number of Uses in Study Area	913	1	5	0	3	32	-	2
		Percent of Citywide in Study Area	41.5%	33.3%	100%	0.0%	100%	45.1%	-	33.3%

Source: 1970 Land Use Survey, San Francisco Department of City Planning

Note: A "use" is one activity of an establishment taking place on a given lot; number of uses cannot be equated with number of establishments.

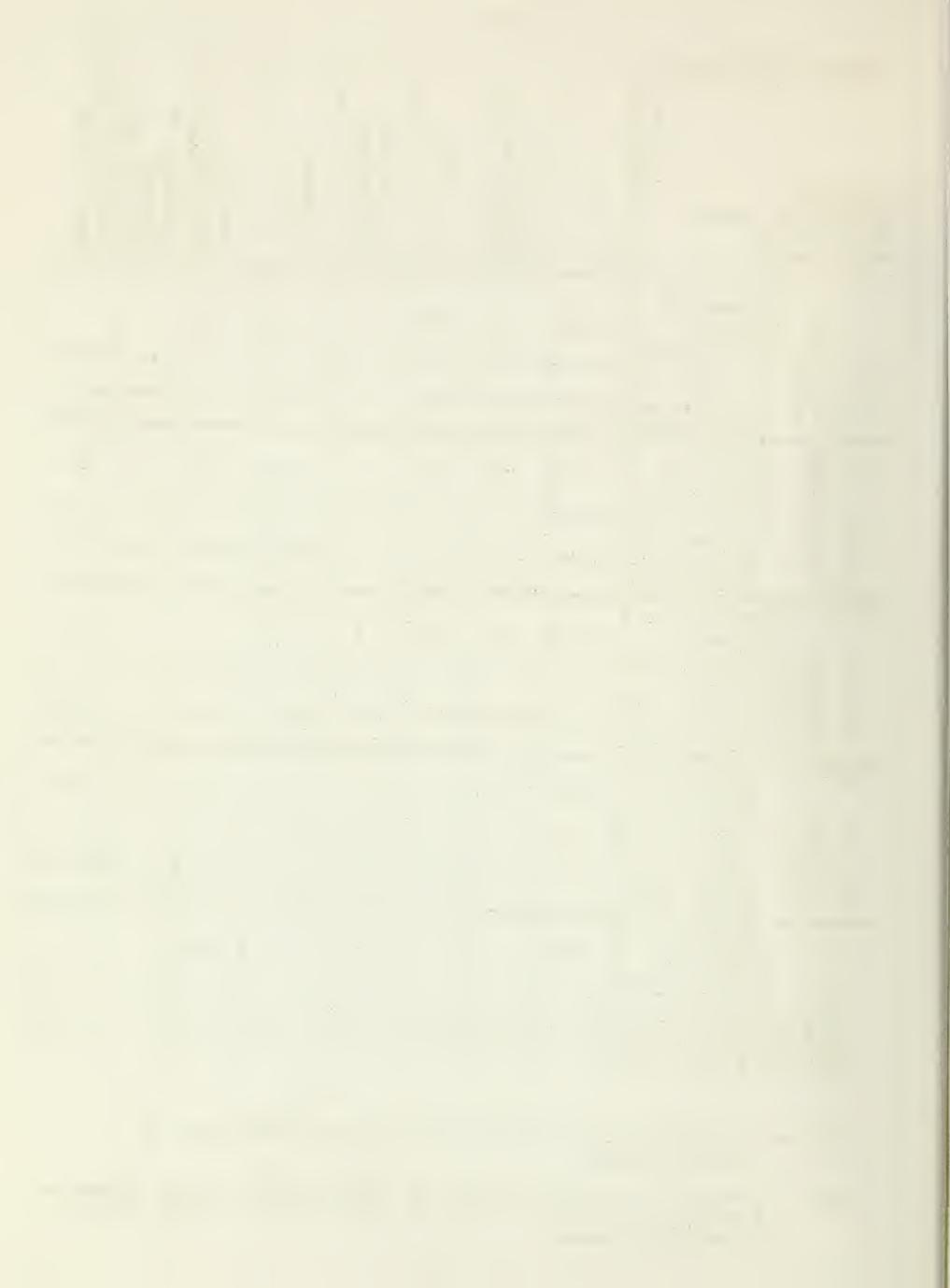


Table 2: Amount of Land in Study Area Containing Uses in Structures, Containing Open-air Uses, or Vacant*

Census Tract	Land Containing Uses in Structures (Acres)	Land Containing Open Air Uses** (Acres)	Open Vacant Land (Acres)
101	66.10	17.03	1.18
102	101.56	0	4.21
103	40.20	0.27	1.22
104	50.61	1.05	3.18
105	24.97	6.70	4.34
106	27.52	1.03	0.45
107	27.14	1.04	0.13
108	35.38	0.13	1.77
109	39.22	0.11	0.24
110	36.77	1.46	0.15
111	37.39	2.00	0
112	27.73	0.36	1.31
113	16.16	0.40	0.24
114	13.84	0.11	0
115	21.07	1.41	1.79
116	26.53	8.77	0
117	80.93	0.75	3.73
118	8.99	0.33	0
119	25.26	0	0.14
120	18.46	0.73	0
121	19.87	0.62	0.08
122	26.58	1.93	0.07
123	28.01	2.13	0.28
124	63.76	5.61	0.05
125	24.95	6.40	0
176	162.47	29.49	1.03
177	118.26	23.32	1.45
178	104.24	13.59	2.69
179	137.30	35.77	2.80
180	134.86	36.43	3.77
226	175.83	38.48	3.20
227	223.84	26.48	27.60
228	195.85	9.53	6.11
229	117.27	4.02	2.67
230	198.25	9.60	12.00
231	261.34	3.32	70.39

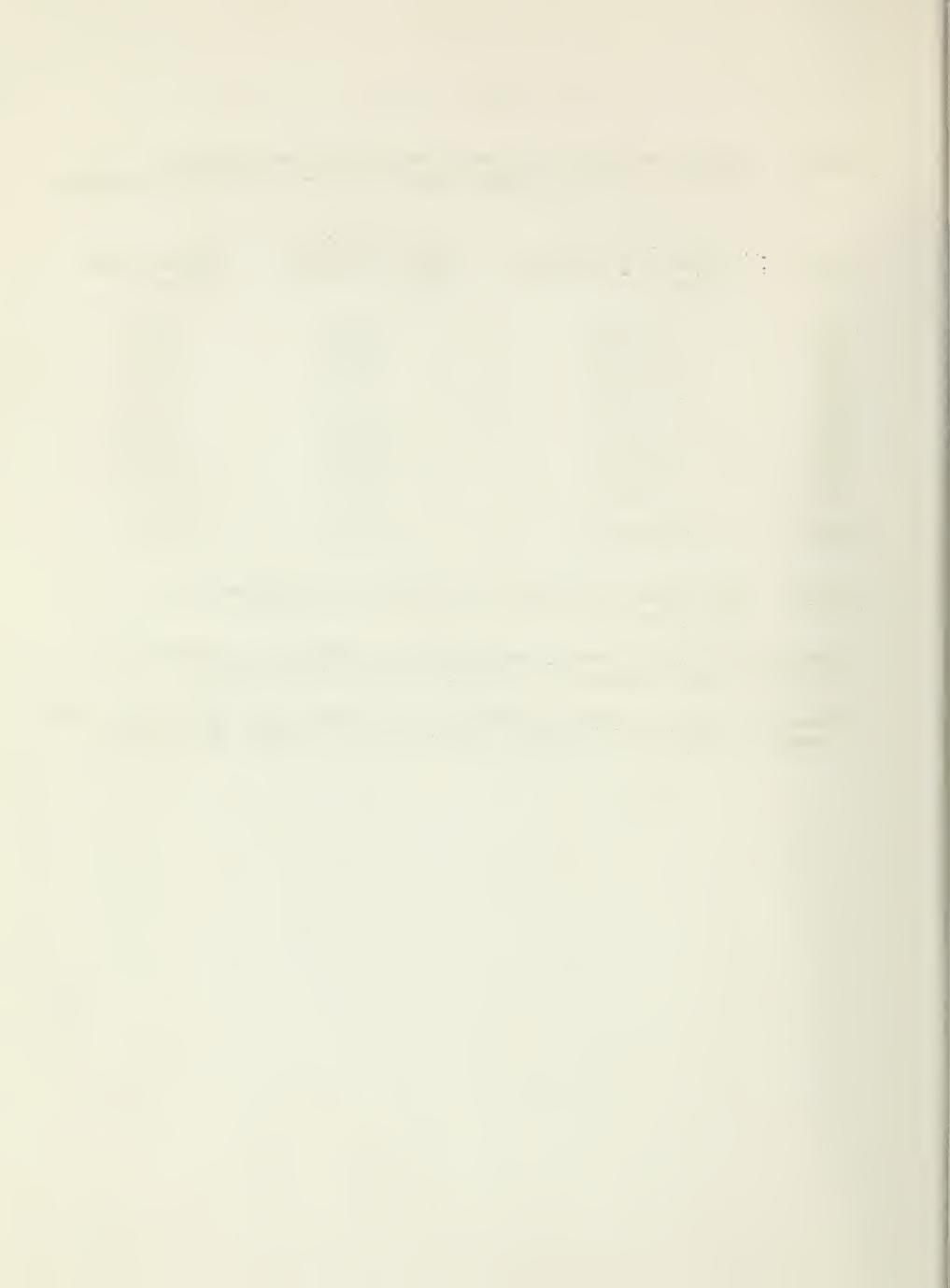
Table 2: Amount of Land in Study Area Containing Uses in Structures, Containing Open-air Uses, or Vacant* (cont.)

Census Tract	Land Containing Uses in Structures (Acres)	Land Containing Open Air Uses** (Acres)	Open Vacant Land (Acres)
232	91.37	13.93	28.56
233	65.76	48.92	7.62
234	110.29	16.15	20.71
251	95.15	0	14.75
606	522.03	0	0
607	126.74	192.04	1.12
608	132.63	74.65	112.62
609	254.15	114.84	12.14
610	140.03	91.51	199.59
Total	4,256.66	878.03	555.38

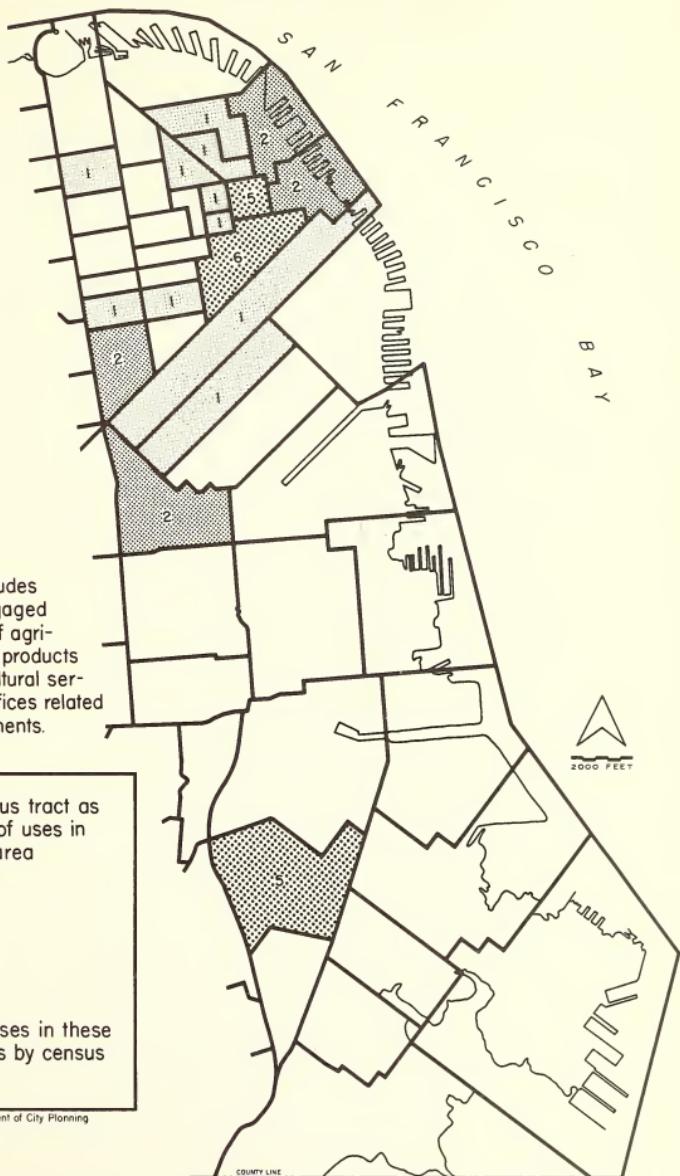
Source: 1970 Land Use Survey, San Francisco Department of City Planning

* Includes all land uses: Residential, Commercial, Industrial, Utility, Institutional, Private Recreation and Public.

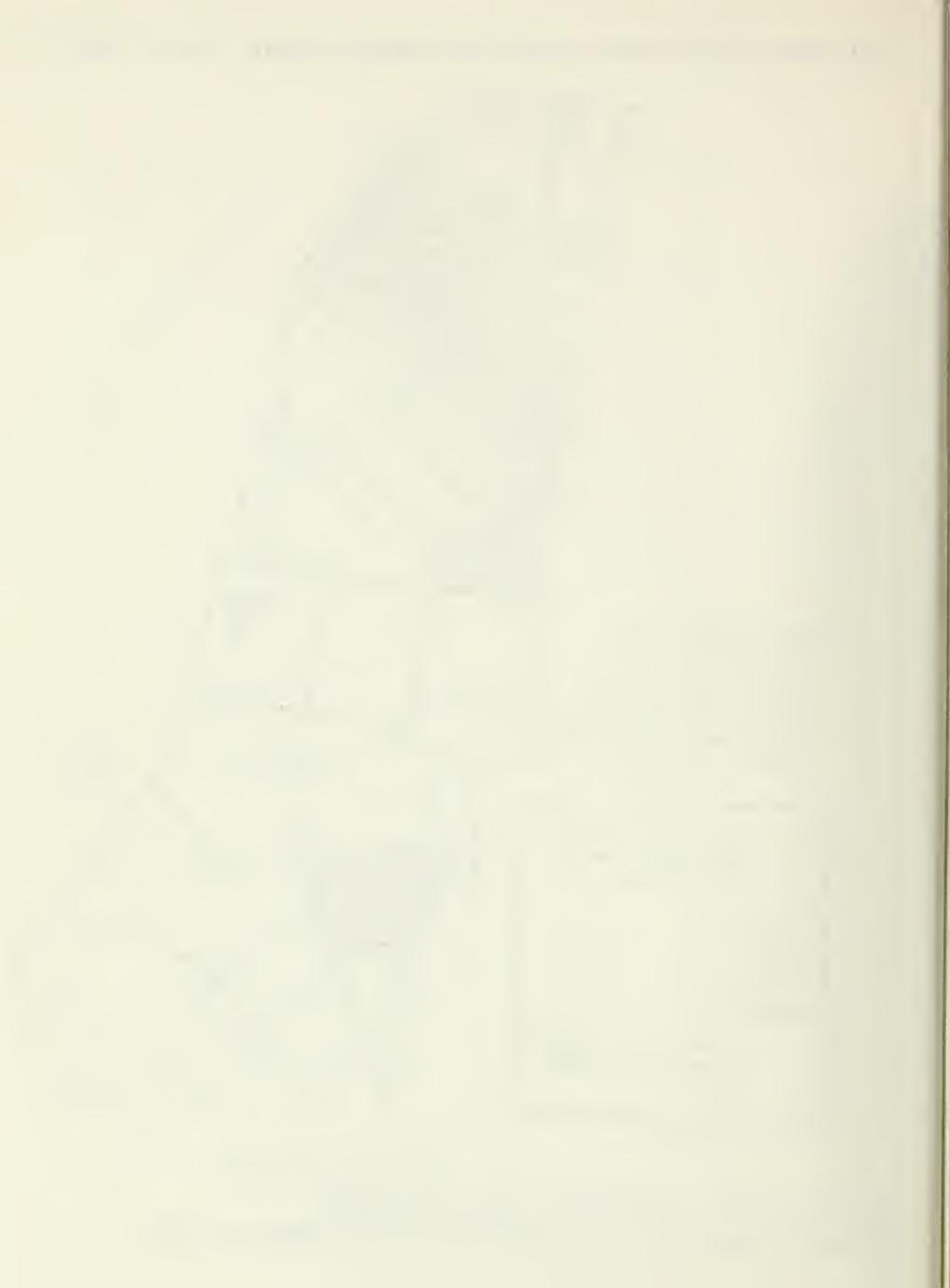
**Open Air Uses include: Used Car or Parking Lot, Other Open Air Commerce, Open Air Industry, and Railroad Tracks or Terminal



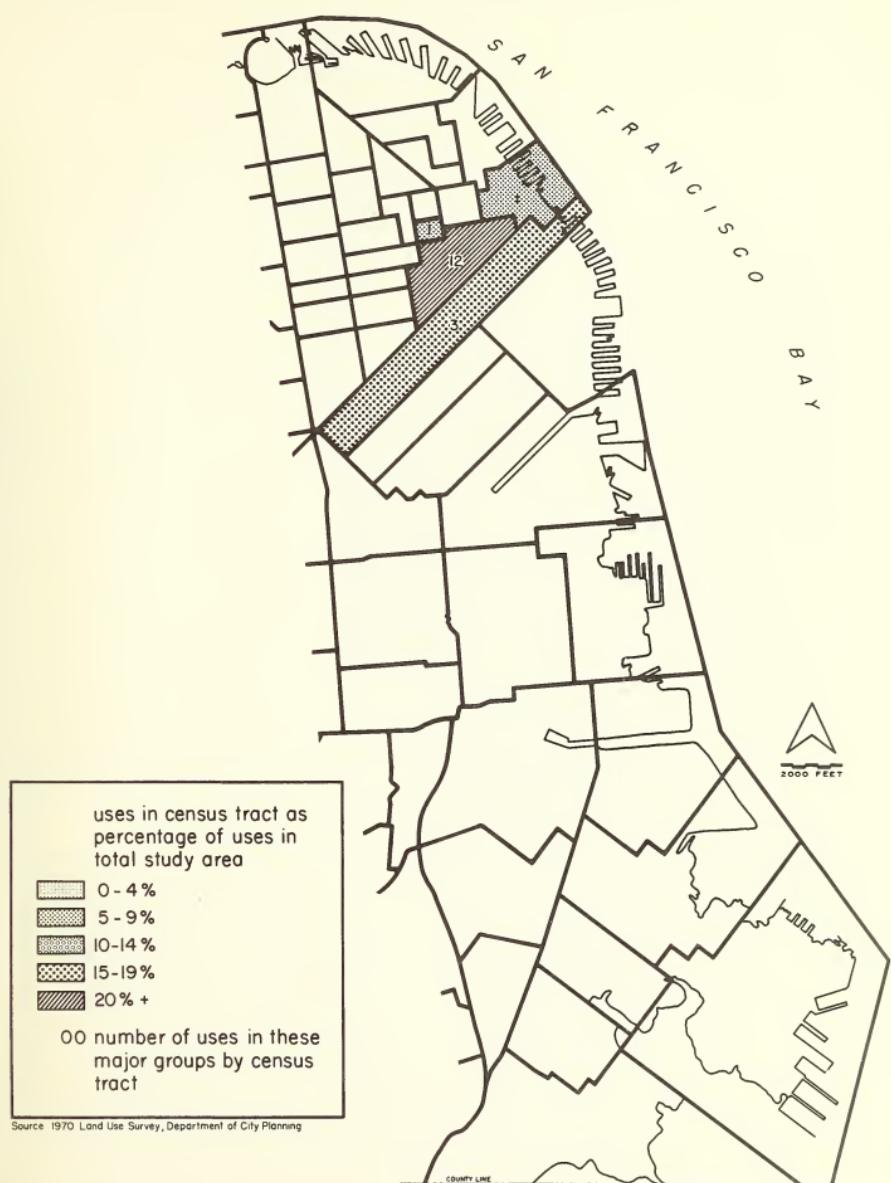
Study Area : Major Commercial and Industrial Census Tracts Map 3

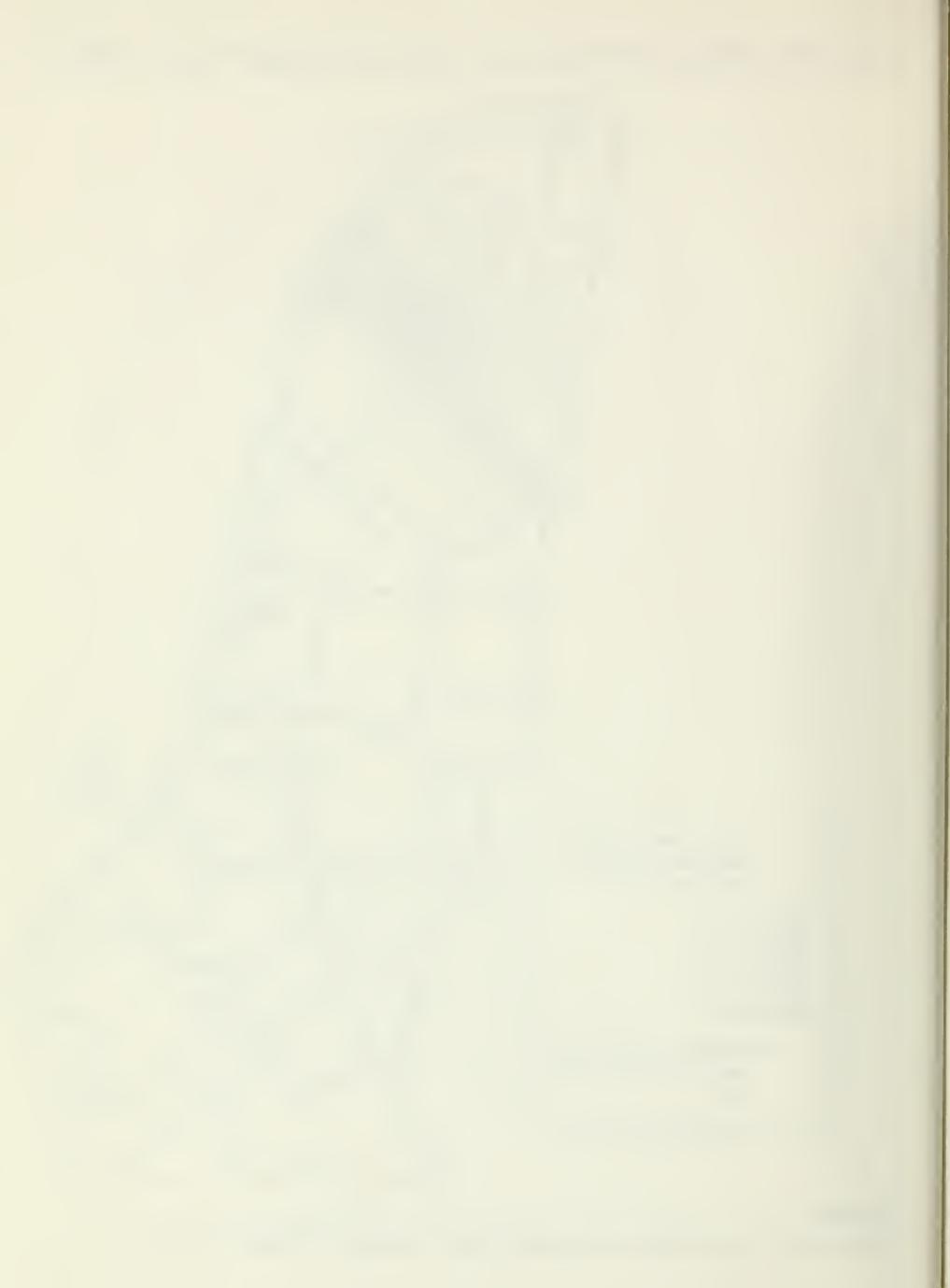


AGRICULTURE, FORESTRY AND FISHERIES
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 01-09

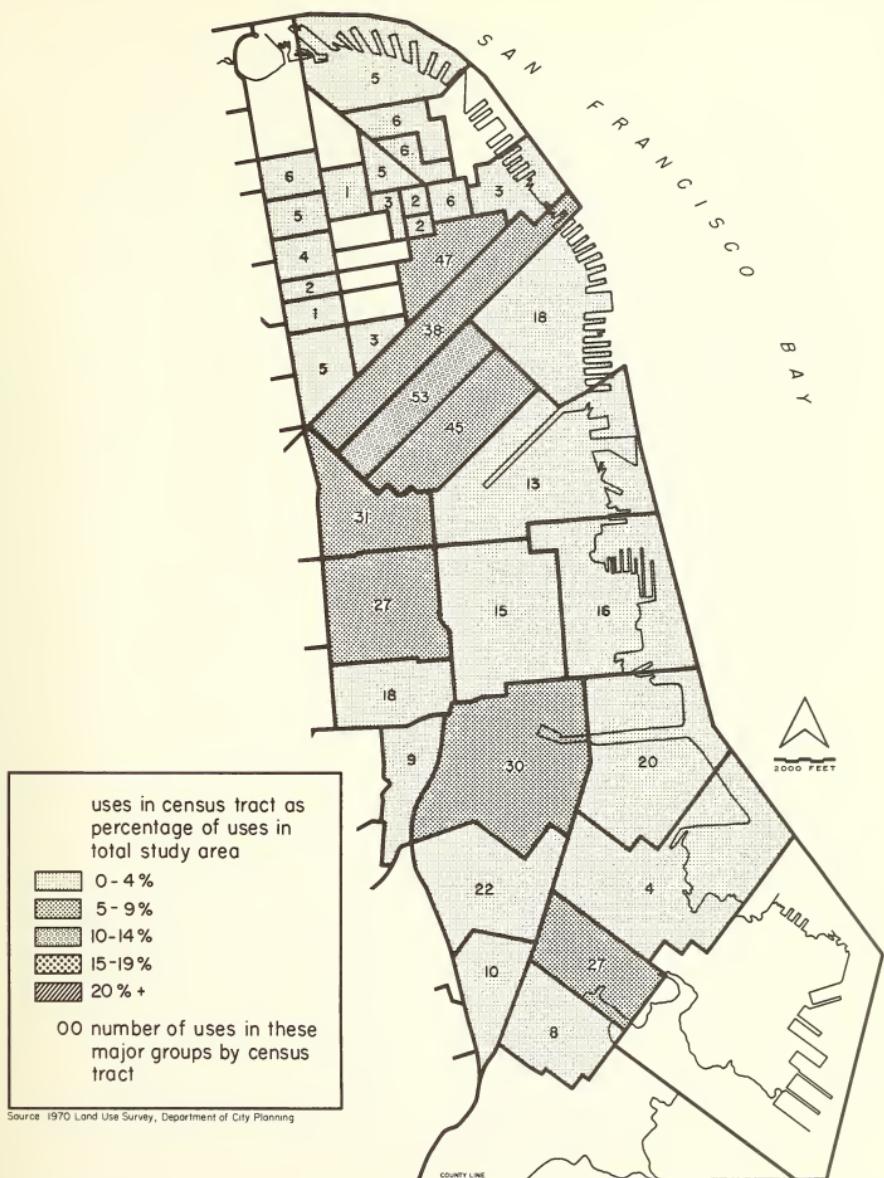


Study Area: Major Commercial and Industrial Census Tracts Map 4

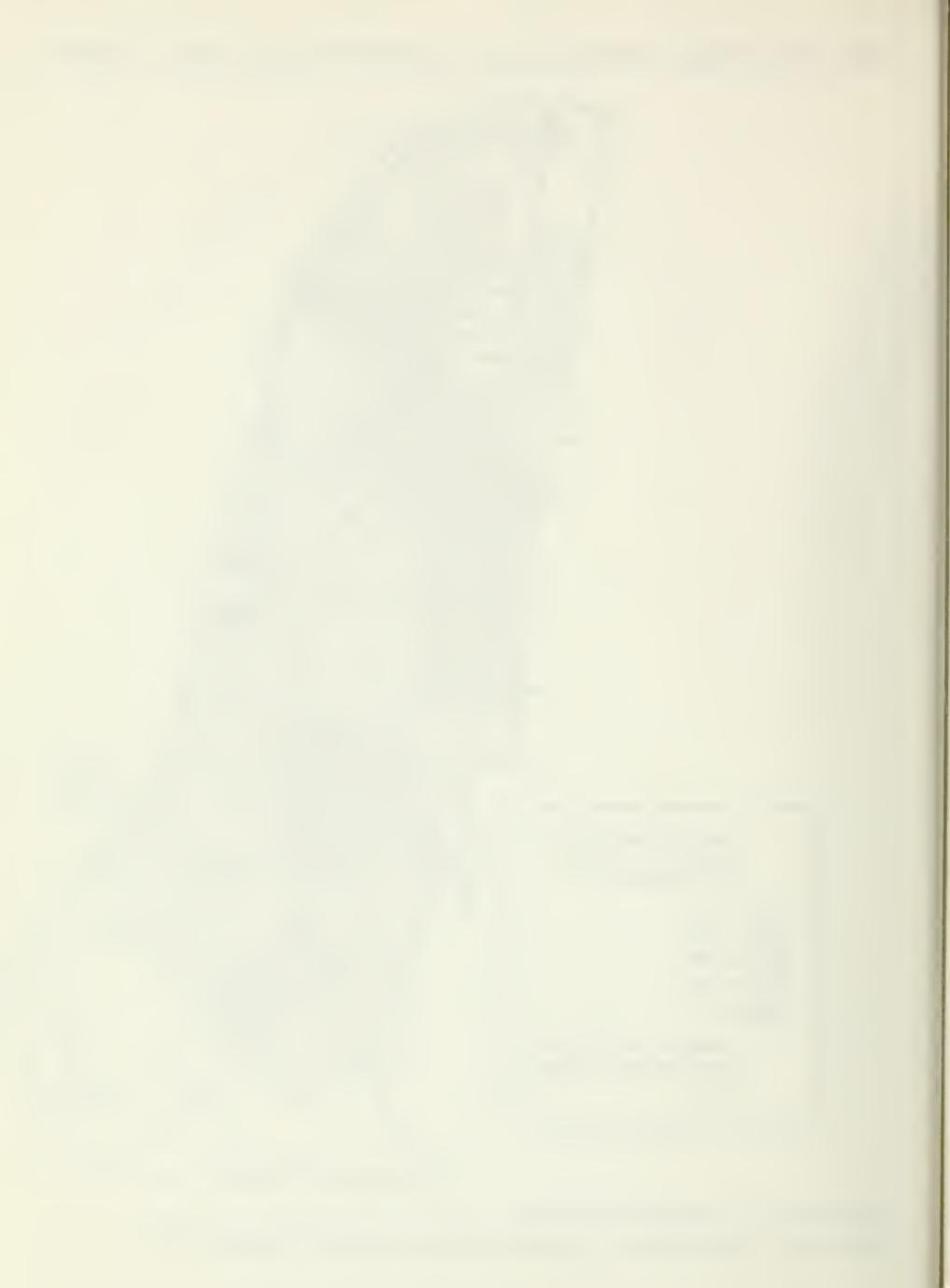




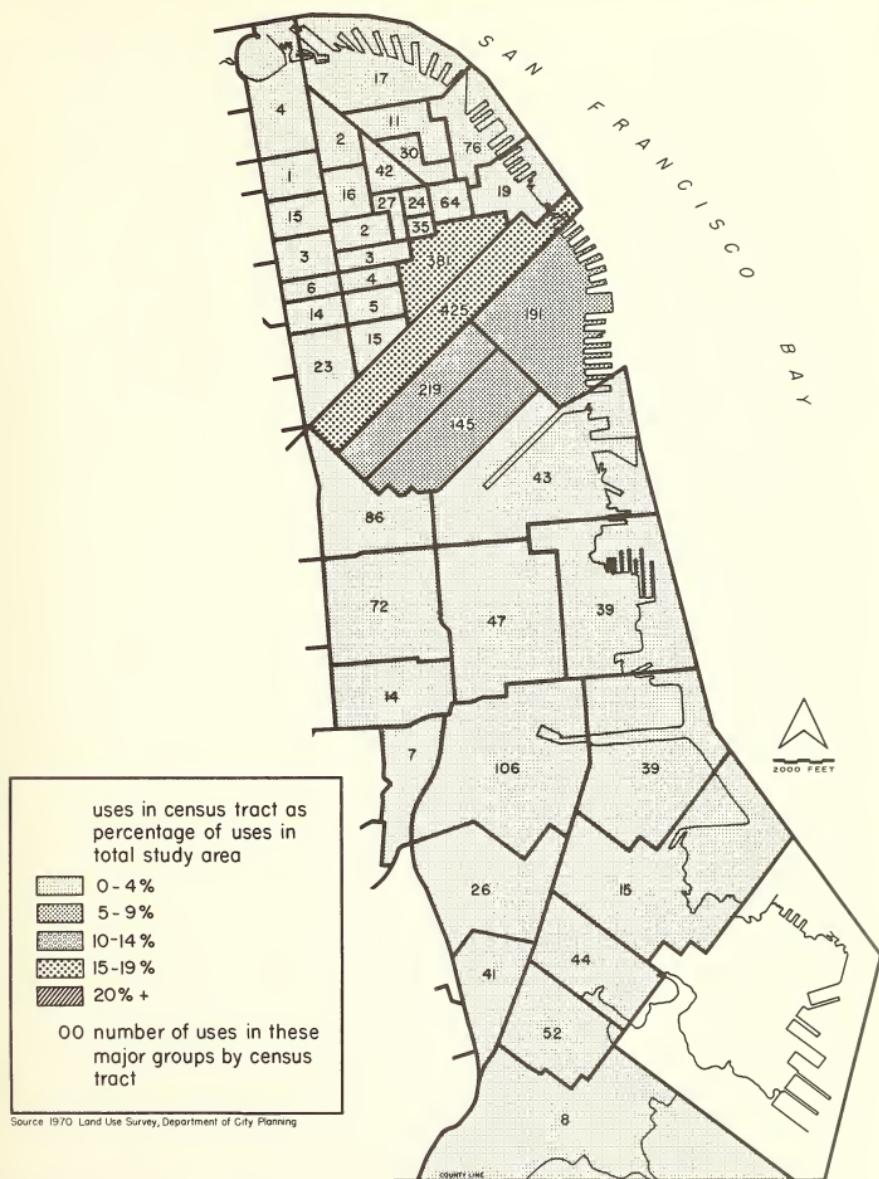
Study Area : Major Commercial and Industrial Census Tracts Map 5



CONTRACT CONSTRUCTION
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 15-17

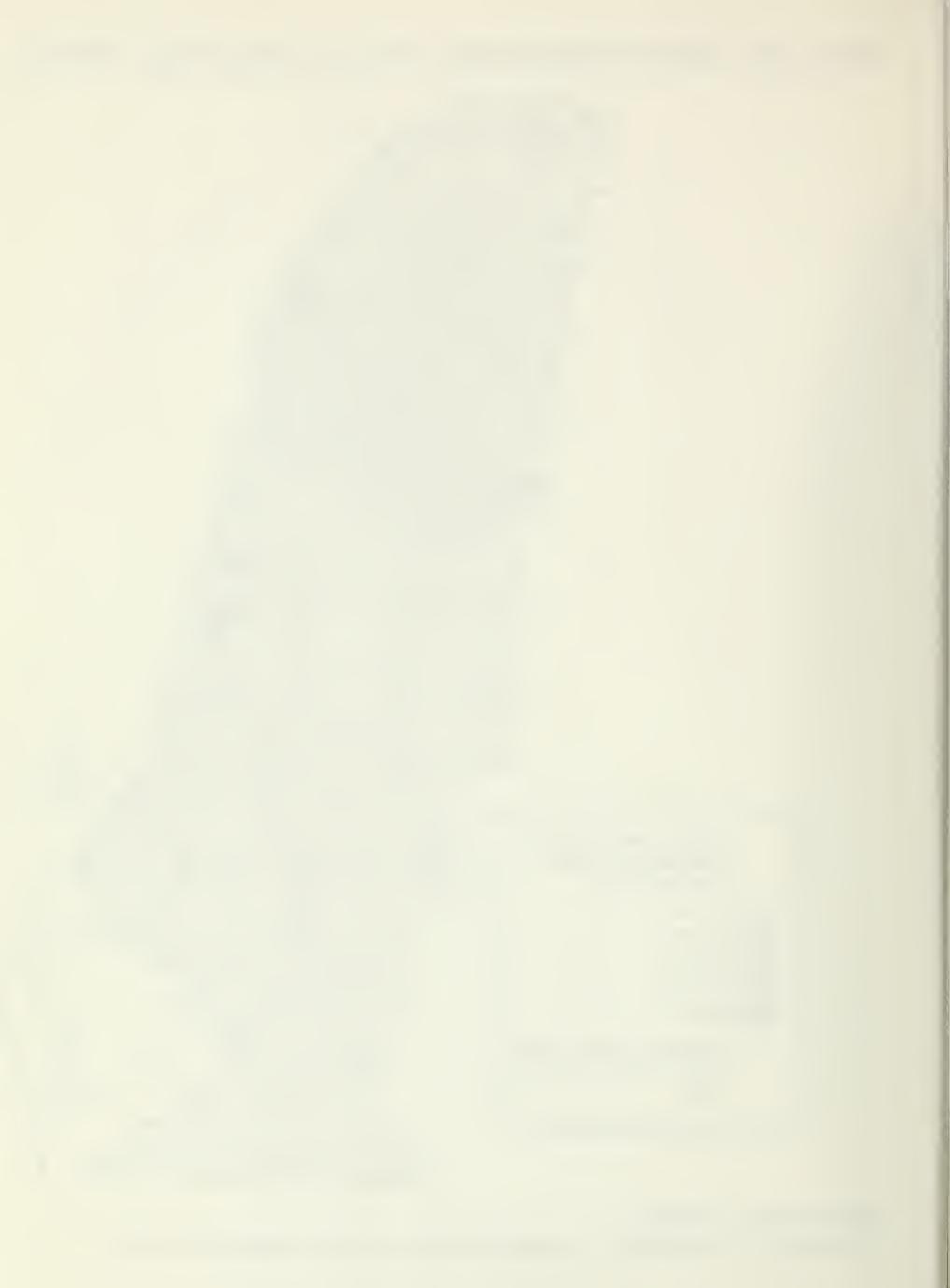


Study Area : Major Commercial and Industrial Census Tracts Map 6

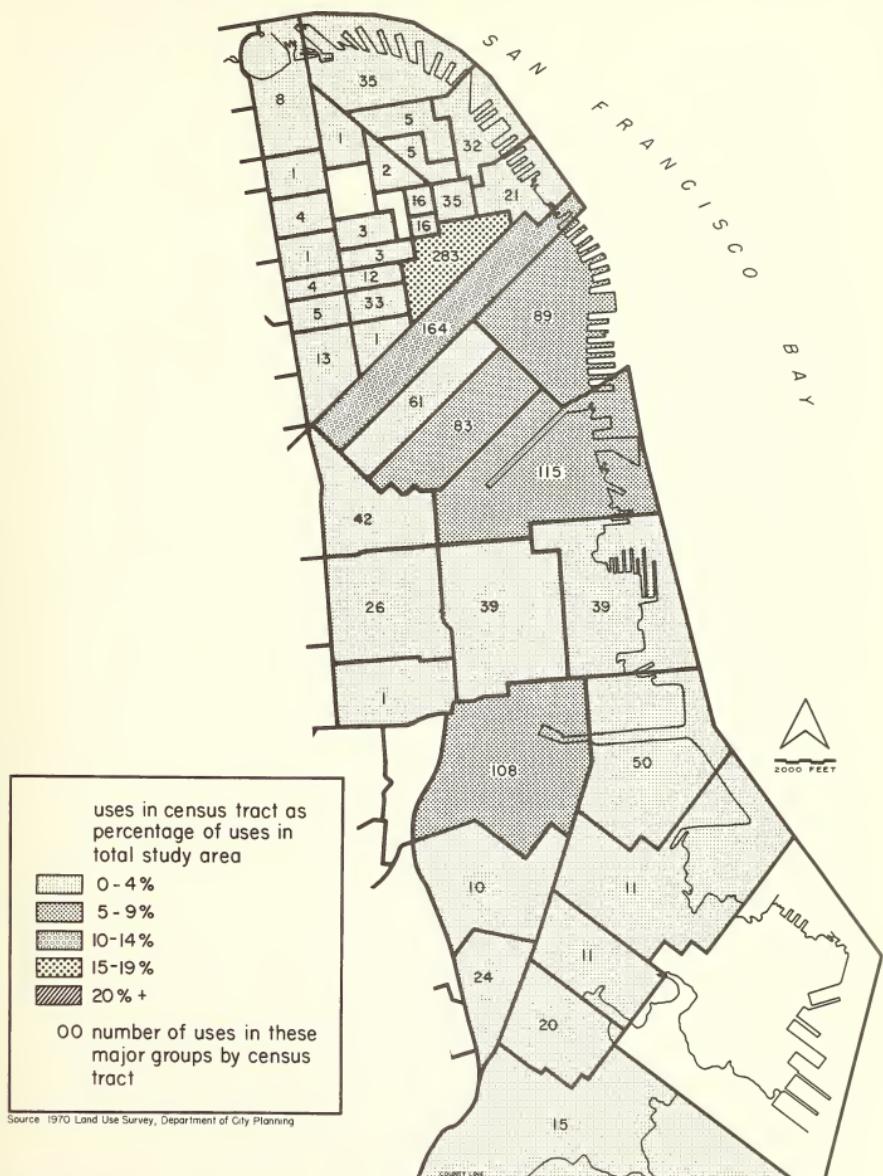


MANUFACTURING

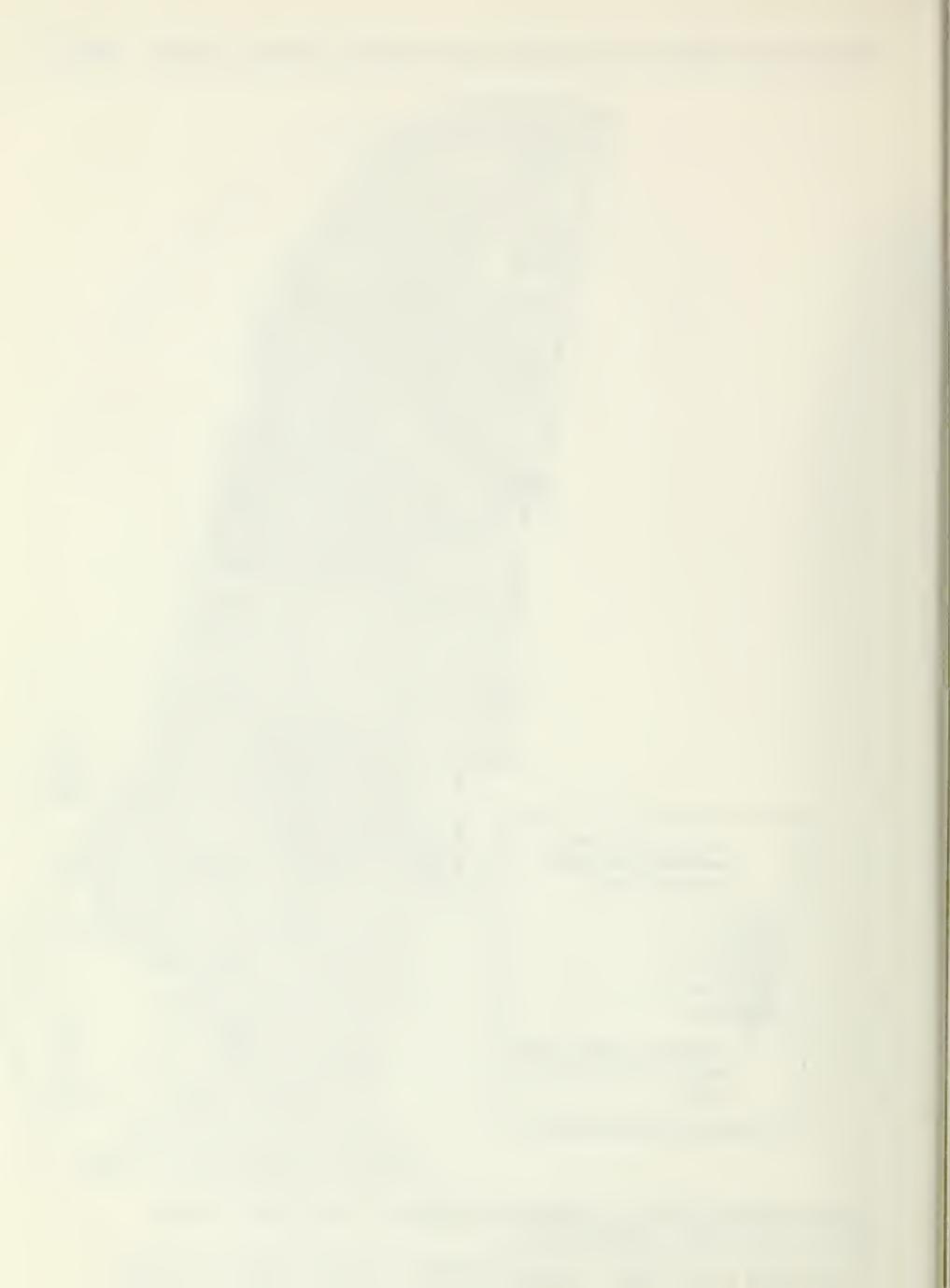
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 19-39



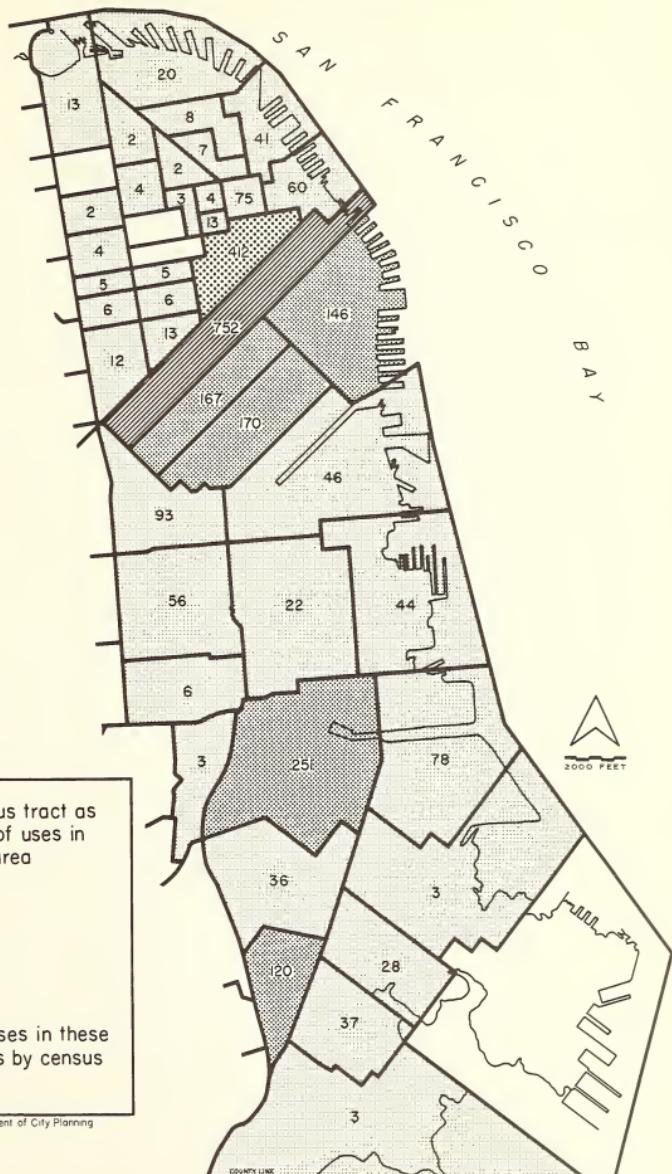
Study Area: Major Commercial and Industrial Census Tracts Map 7



TRANSPORTATION, COMMUNICATION, ELECTRIC, GAS
AND SANITARY SERVICES
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 40-49



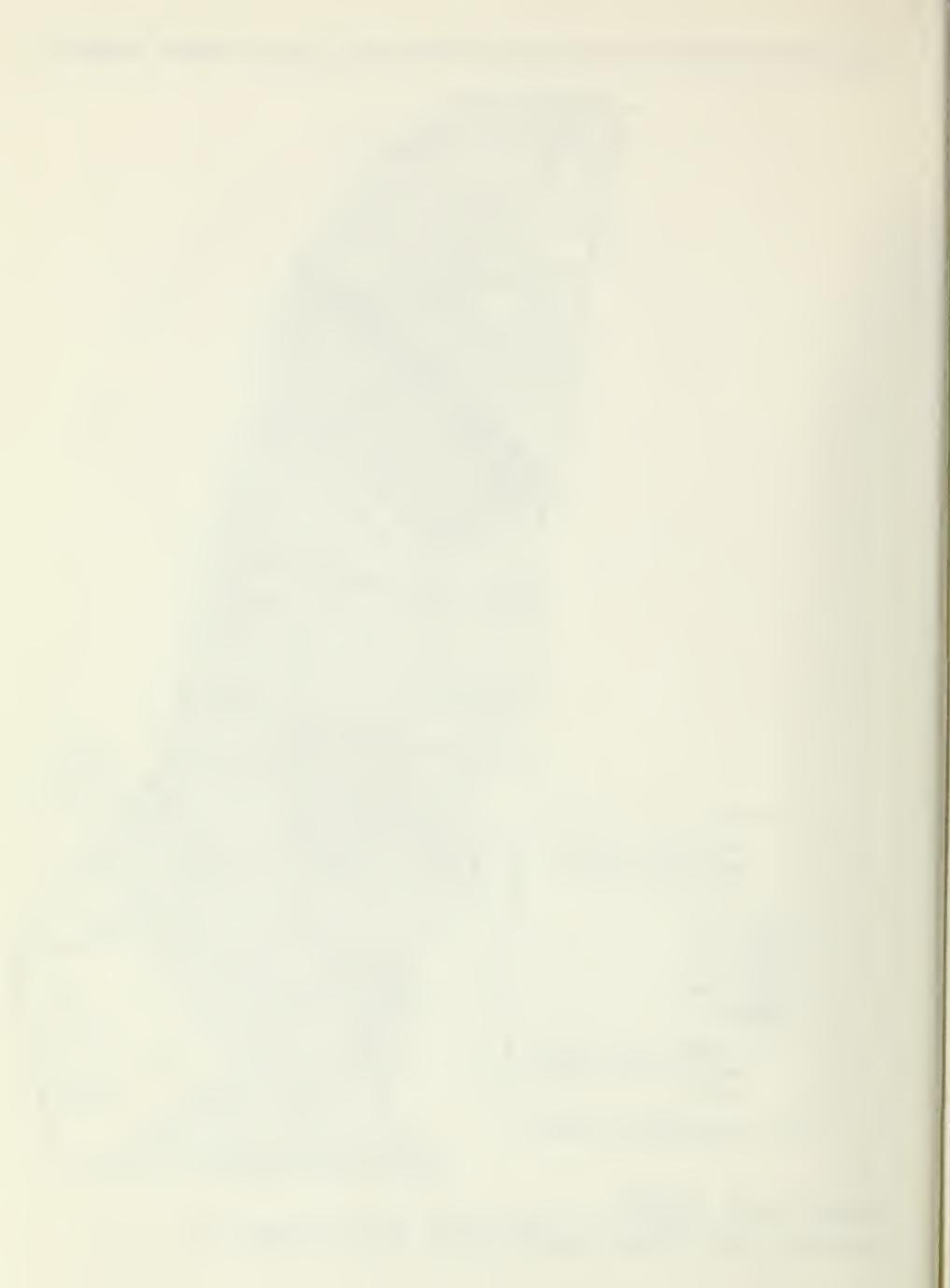
Study Area : Major Commercial and Industrial Census Tracts Map 8



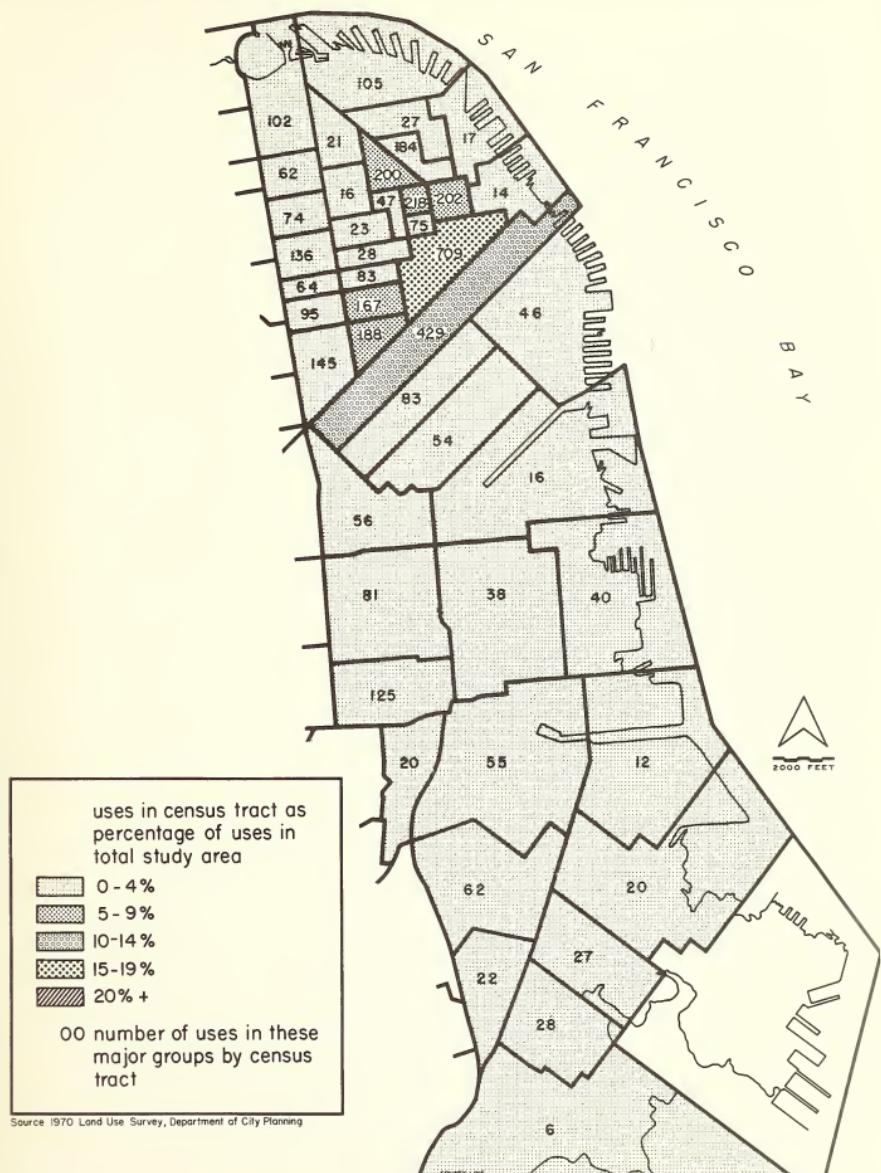
Source: 1970 Land Use Survey, Department of City Planning

WHOLESALE TRADE

STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUP 50



Study Area: Major Commercial and Industrial Census Tracts Map 9

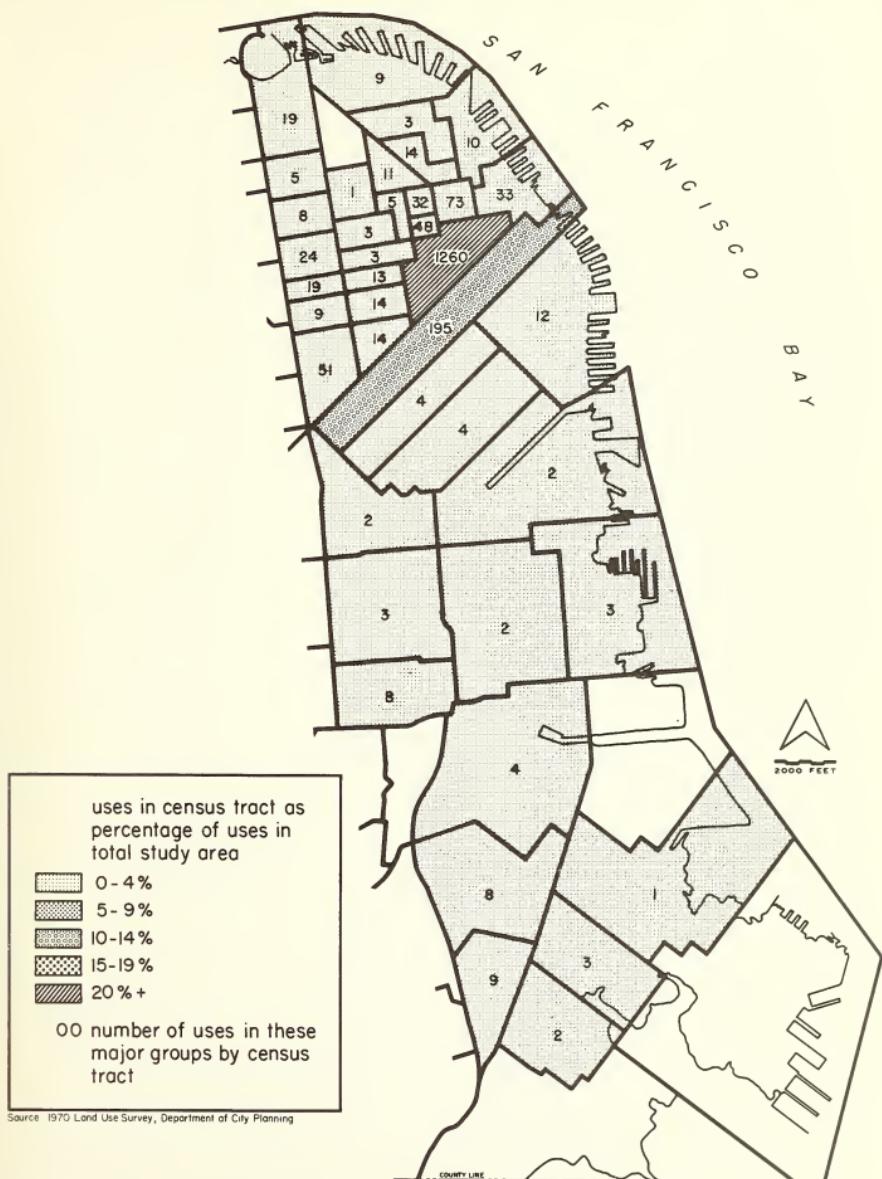


RETAIL TRADE

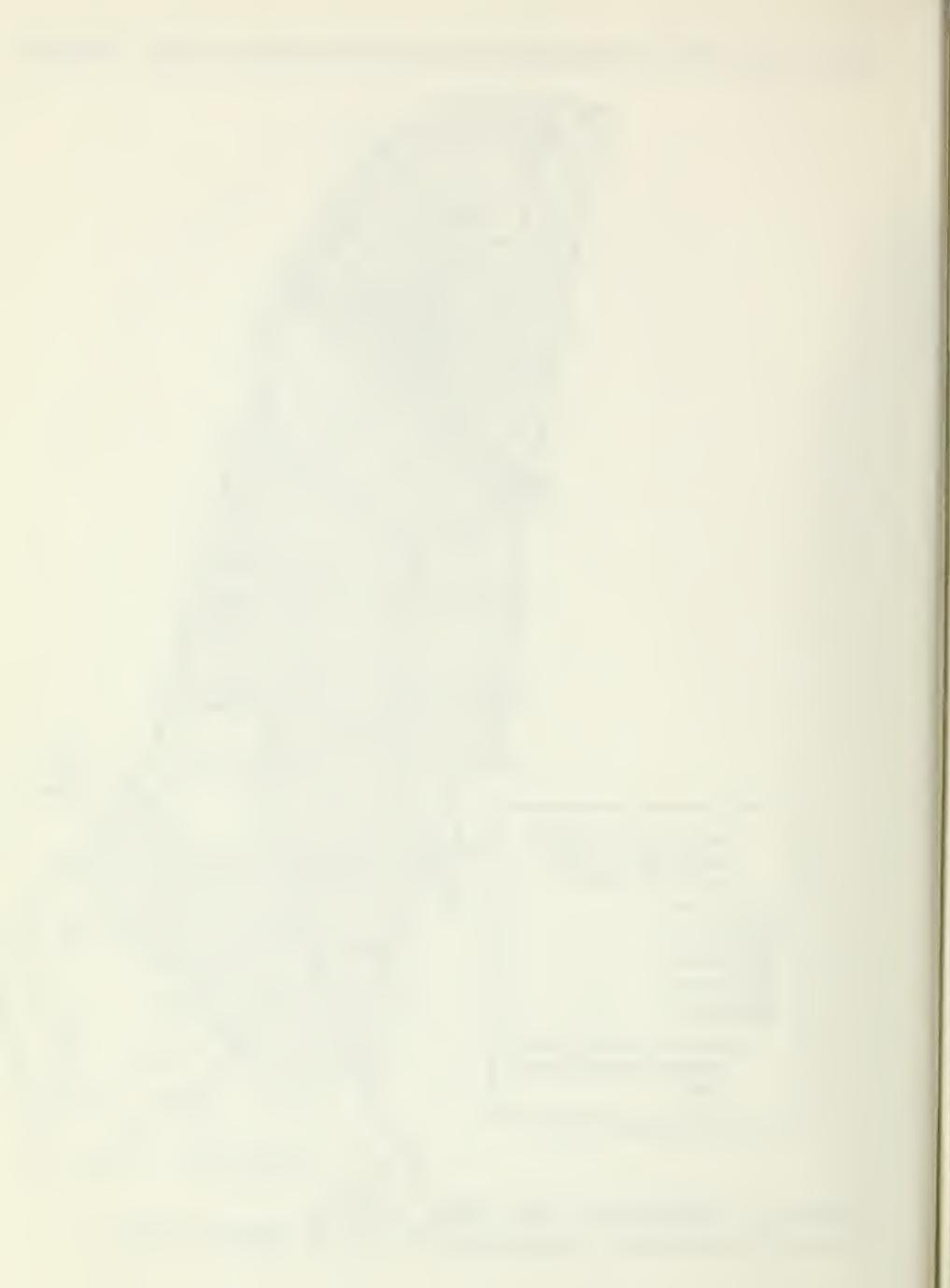
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 52-59



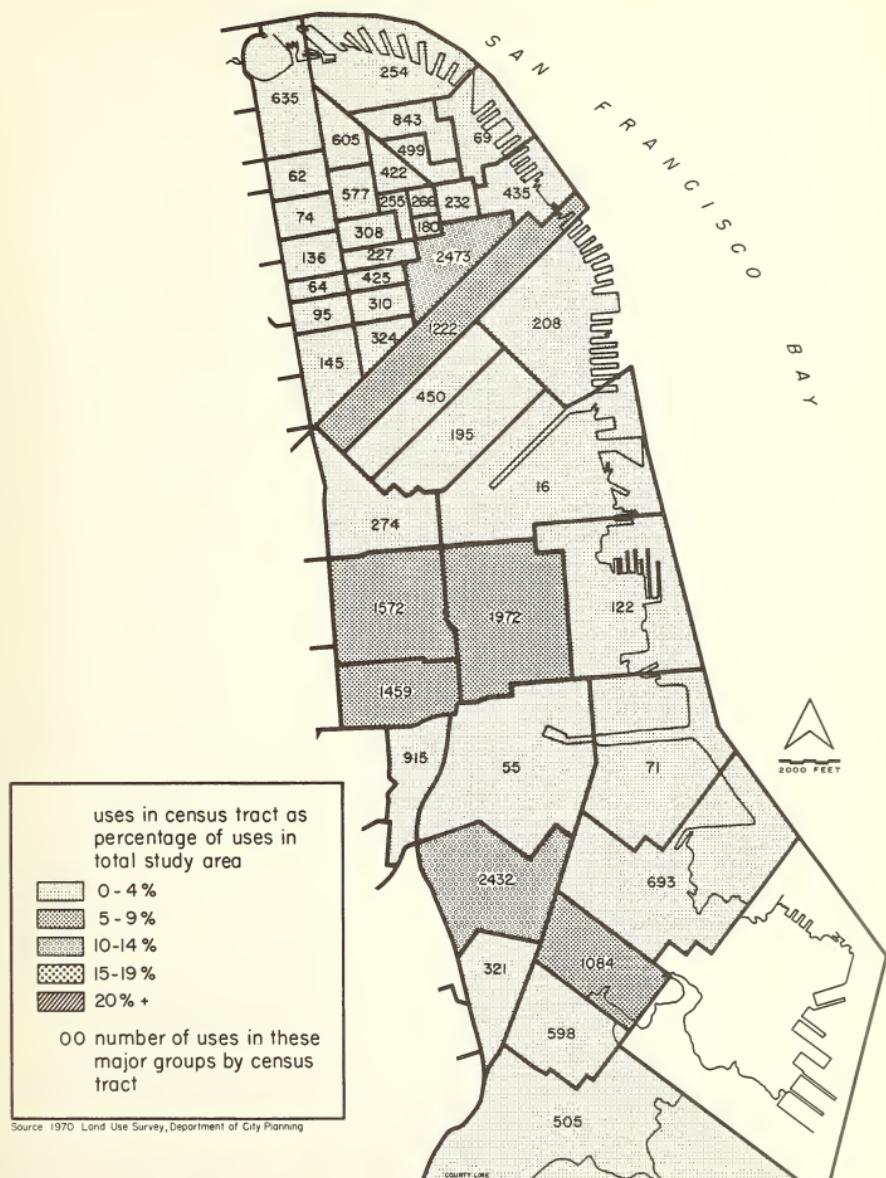
Study Area : Major Commercial and Industrial Census Tracts Map 10



FINANCE, INSURANCE AND REAL ESTATE
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 60-67



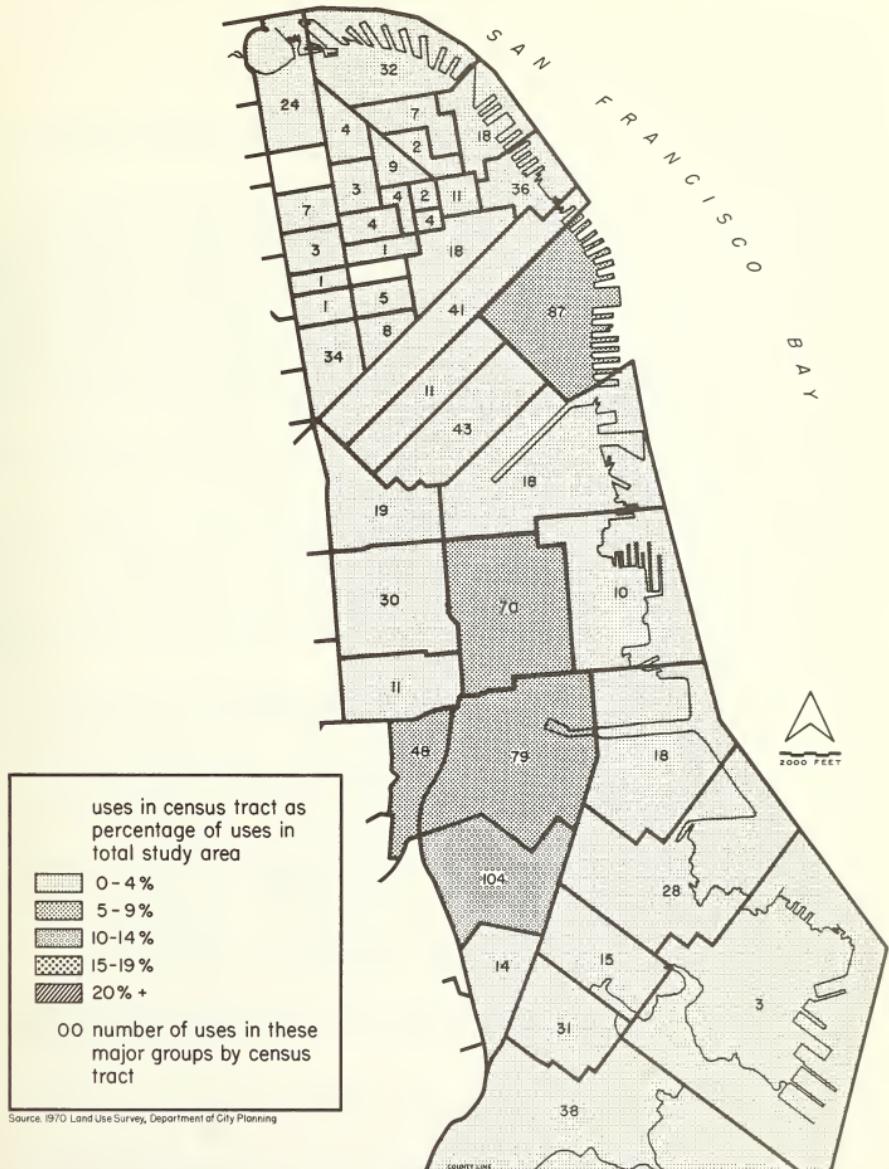
Study Area : Major Commercial and Industrial Census Tracts Map II



SERVICES

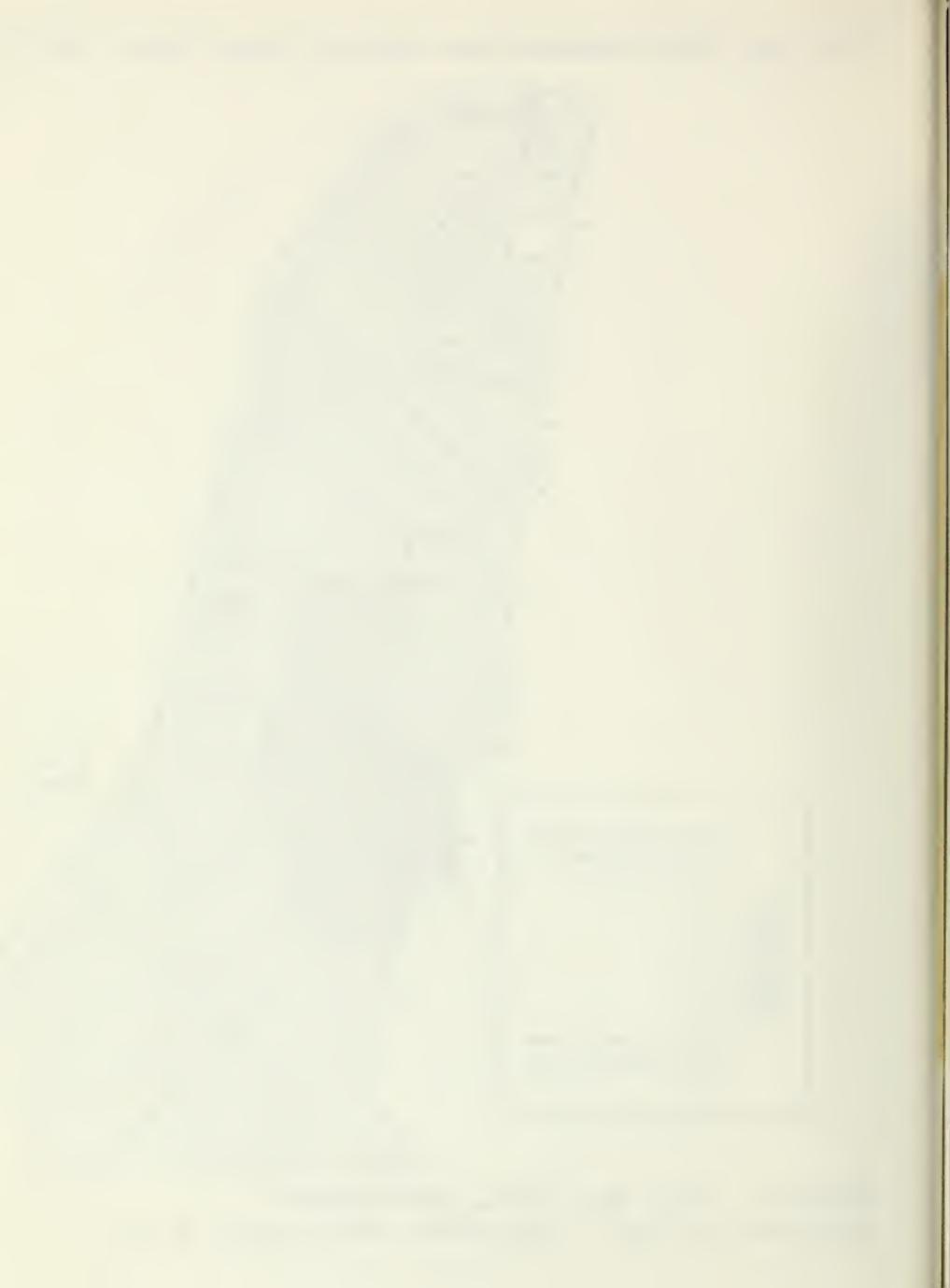
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 70-89

Study Area : Major Commercial and Industrial Census Tracts Map I2



Source: 1970 Land Use Survey, Department of City Planning

FEDERAL, STATE AND LOCAL GOVERNMENT
STANDARD INDUSTRIAL CLASSIFICATION - MAJOR GROUPS 91-93



II. LAND-USE CONDITIONS

The great majority of land used for industry in San Francisco is located in the section of the city south of Market Street and east of Mission Street. Due to current trends in the industrial sector of the economy (see "Industrial Trends" background report), the possibility is great that important land-use changes will occur in this industrial area. For that reason a project was undertaken to record the existing condition of both the commercial and industrial physical plants of this section of the city. In addition, a review was made of building condition information from the 1964 Community Renewal Program for the purposes of reference.

1975 CONDITION OBSERVATION

The Field Observation Project consisted of direct observation by staff members of the street corridors throughout each of the Planning Areas in the project area, and in the commercial and industrial portions of certain adjacent Planning Areas. A "street corridor" was defined as a single segment of street between two intersections plus the structures and land facing that street on either side. For each street corridor observed, the following information was recorded:

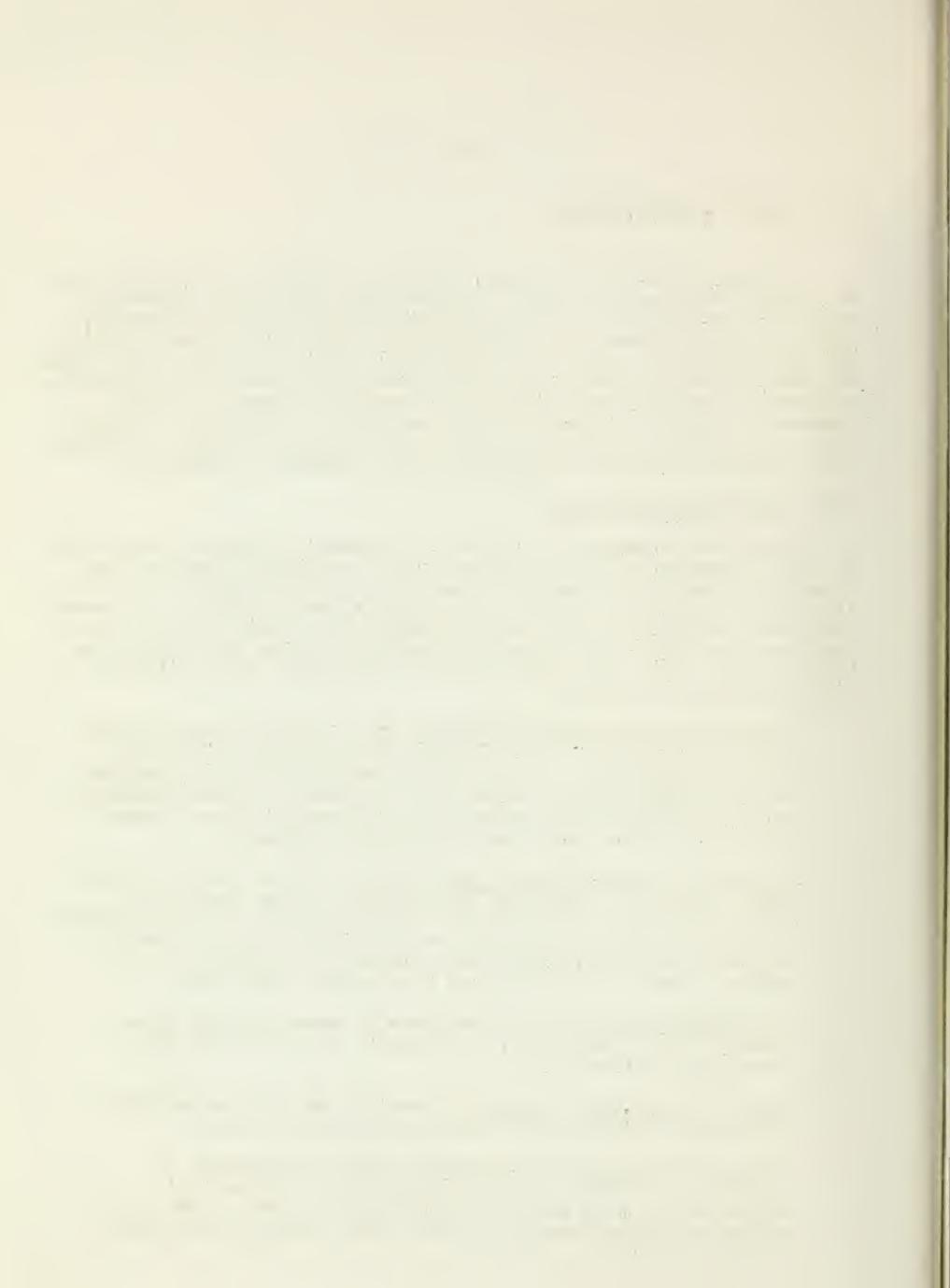
Location of Environmental Amenities - those factors of the environment which tend to affect the quality of the community positively. These include areas of landscaping and improved open space, structures obviously in good condition and consistently well maintained, recently rehabilitated older structures, and new development projects.

Location of Environmental Detriments - those factors which have a negative effect on the quality of the community. Among the items noted in this classification were structures in bad condition or vacant, vacant usable land, areas of conflict between adjacent land uses, and problems on the street caused by the parking and loading functions.

Predominant Land Uses - the types of uses in each street corridor that occur most frequently and establish the character of the area.

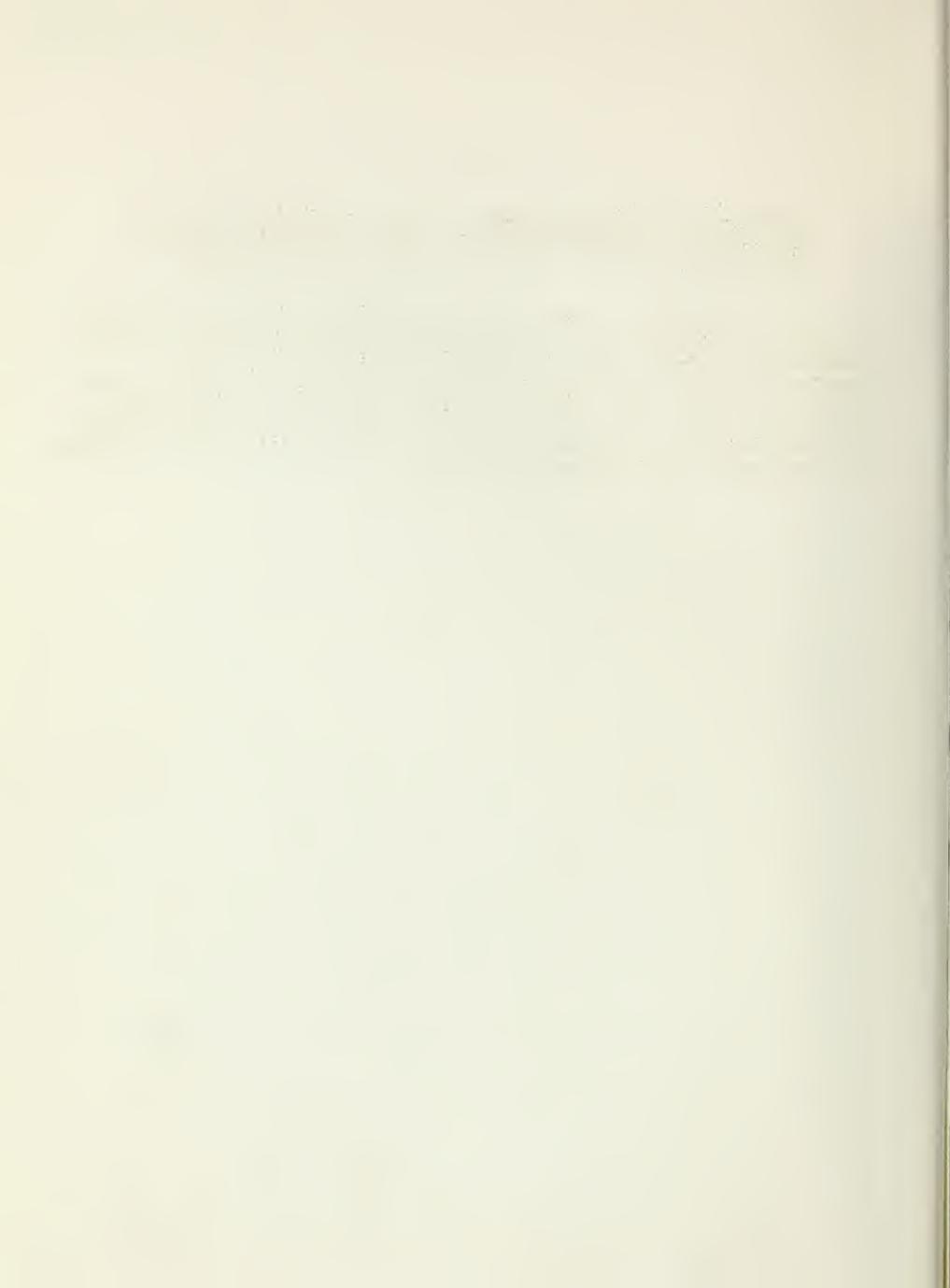
Amount of Building Vacancy - recorded as the percentage of buildings in each street corridor which are vacant.

Status of Structure Maintenance - the percentages of structures in each street corridor which are either adequate, in need of surface fix-up, in need of rehabilitation or dilapidated to a point where demolition would be appropriate.

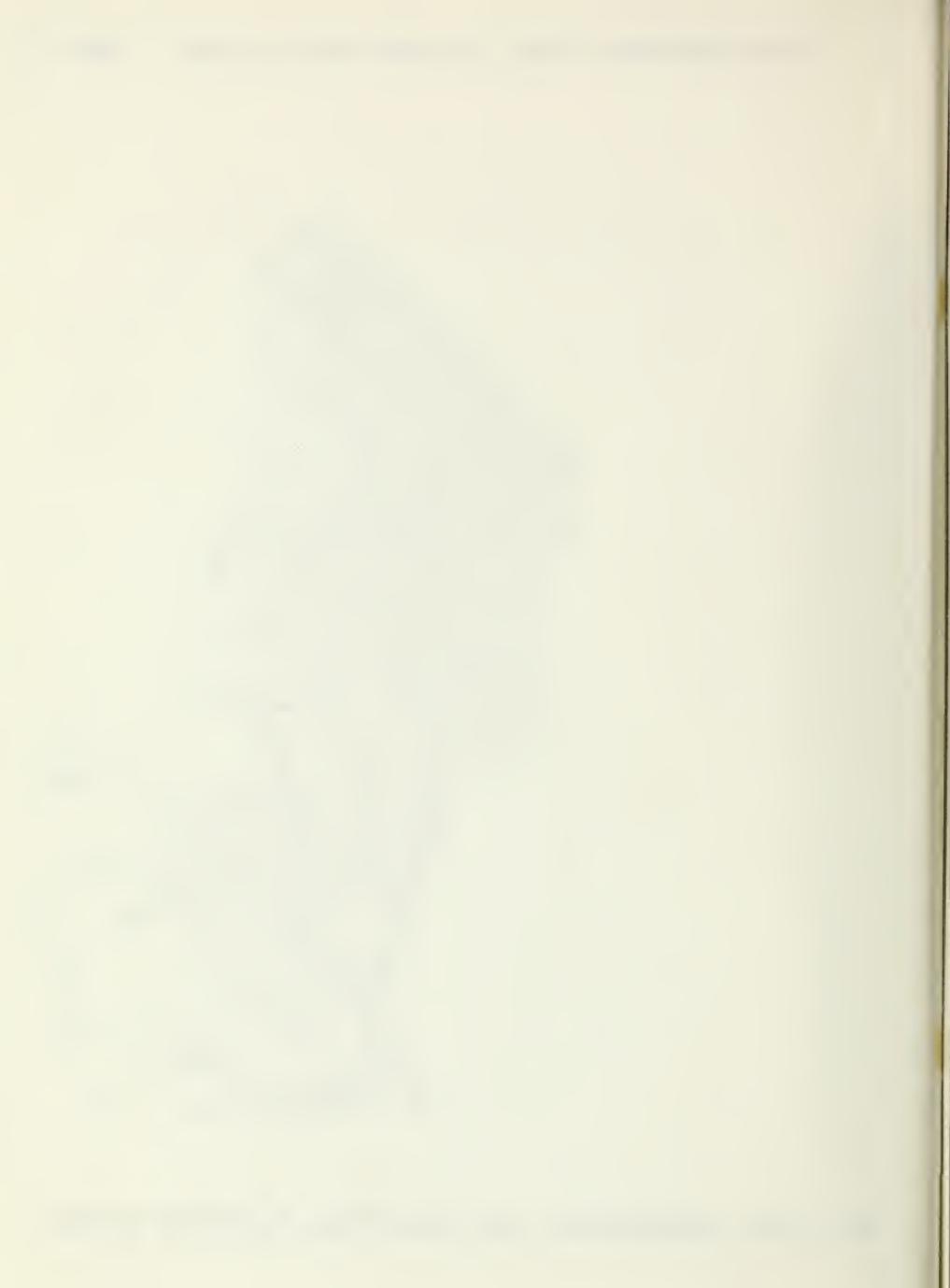


Condition of Infrastructure - general observations as to the quality of street repair, street lighting, parking facilities, transit facilities and rail and highway accessibility.

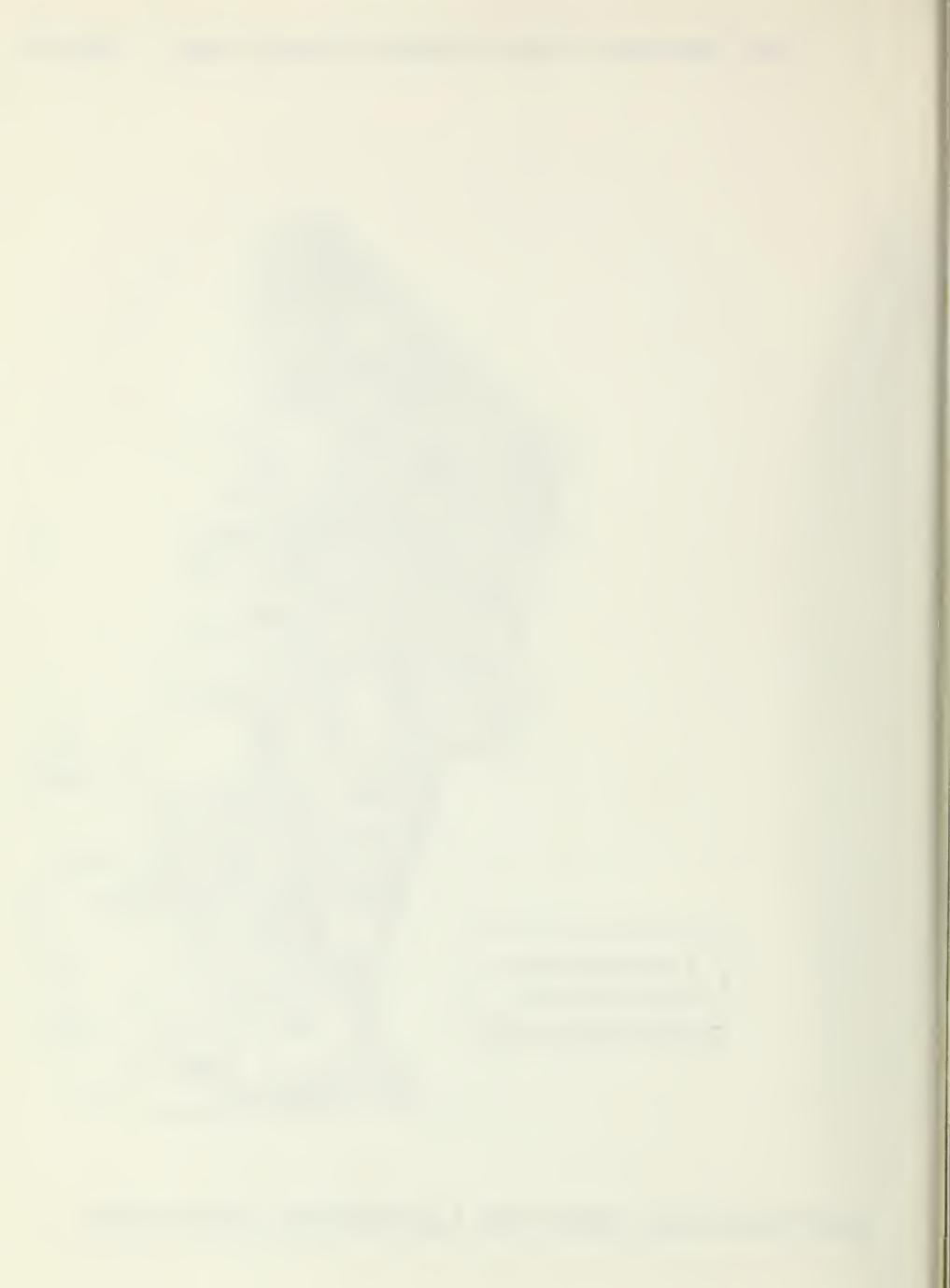
The locations of environmental amenities and detriments were recorded on a map of each of the selected planning areas. This information is shown for the entire section of the city on Maps 14 through 17 in this report. A separate information sheet was made for the uses, vacancy, maintenance and infrastructure information for each street corridor. All these materials will be available for development of the land-use policies and programs of the Commerce and Industry Element.





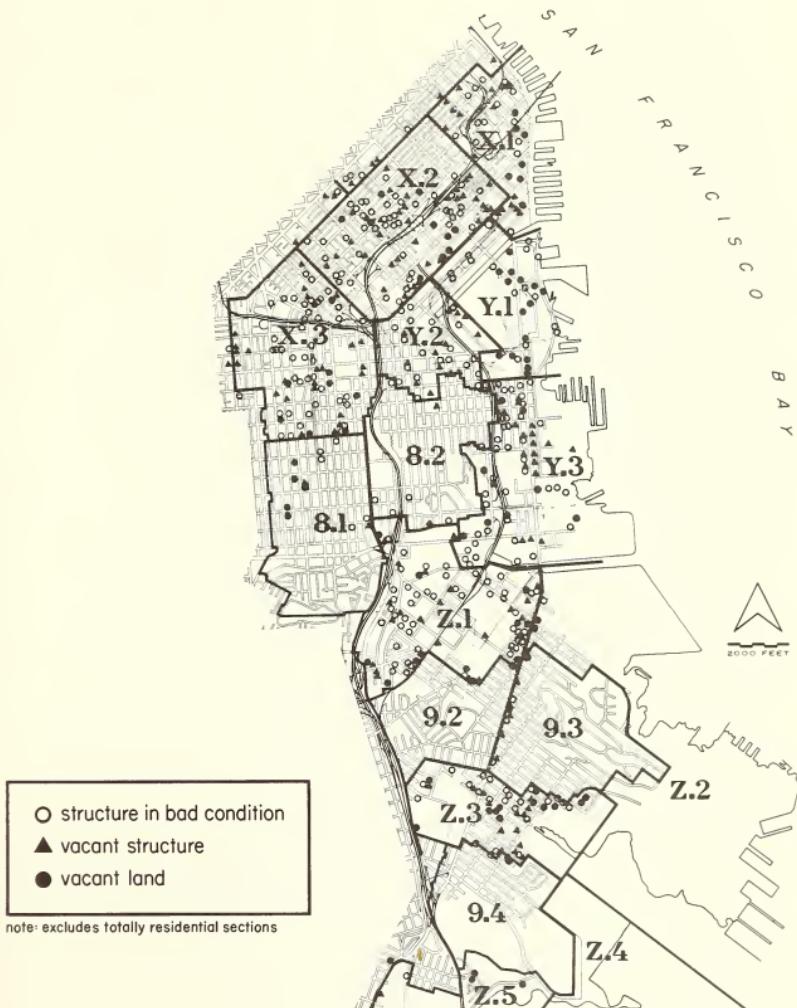


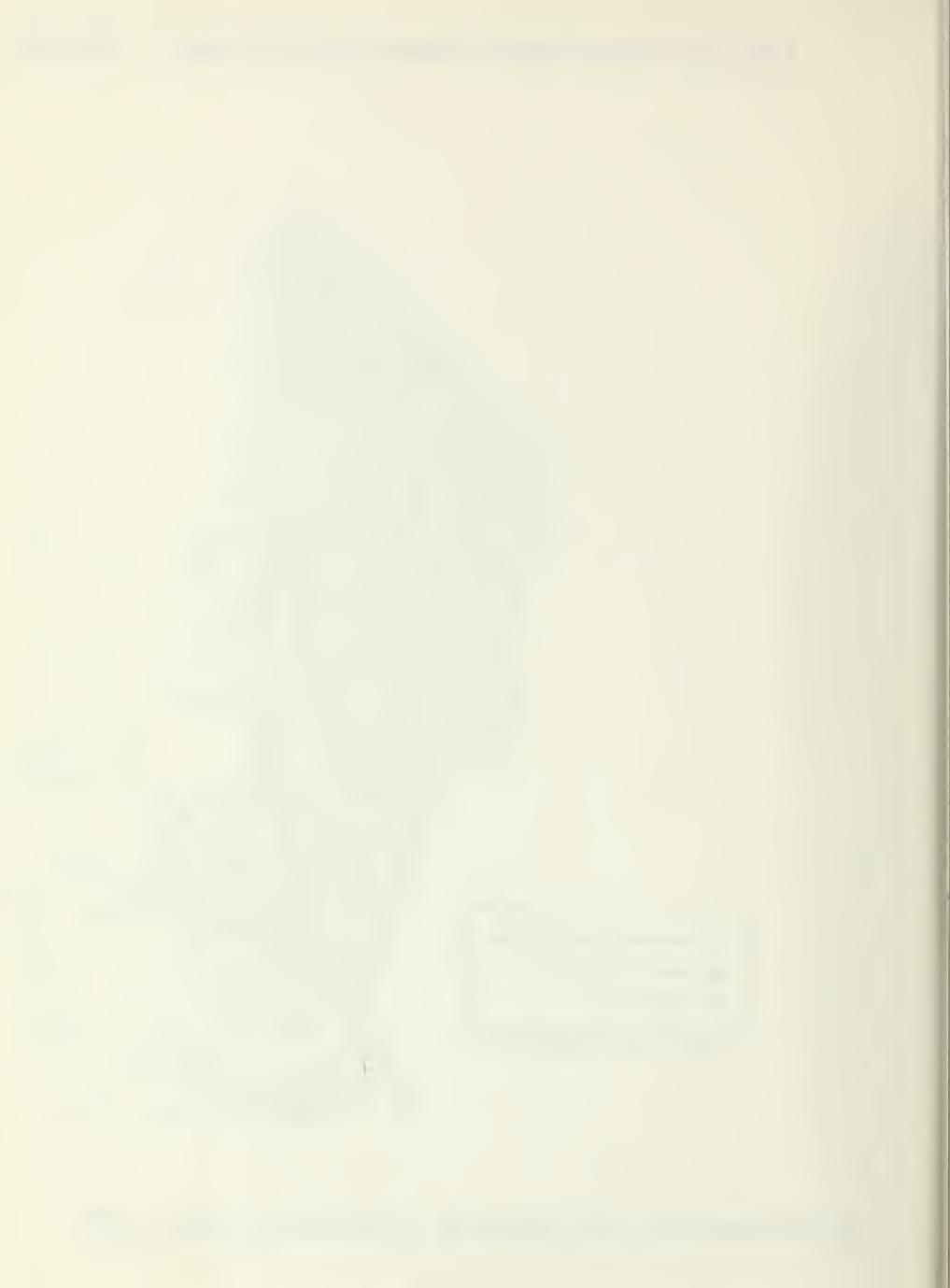


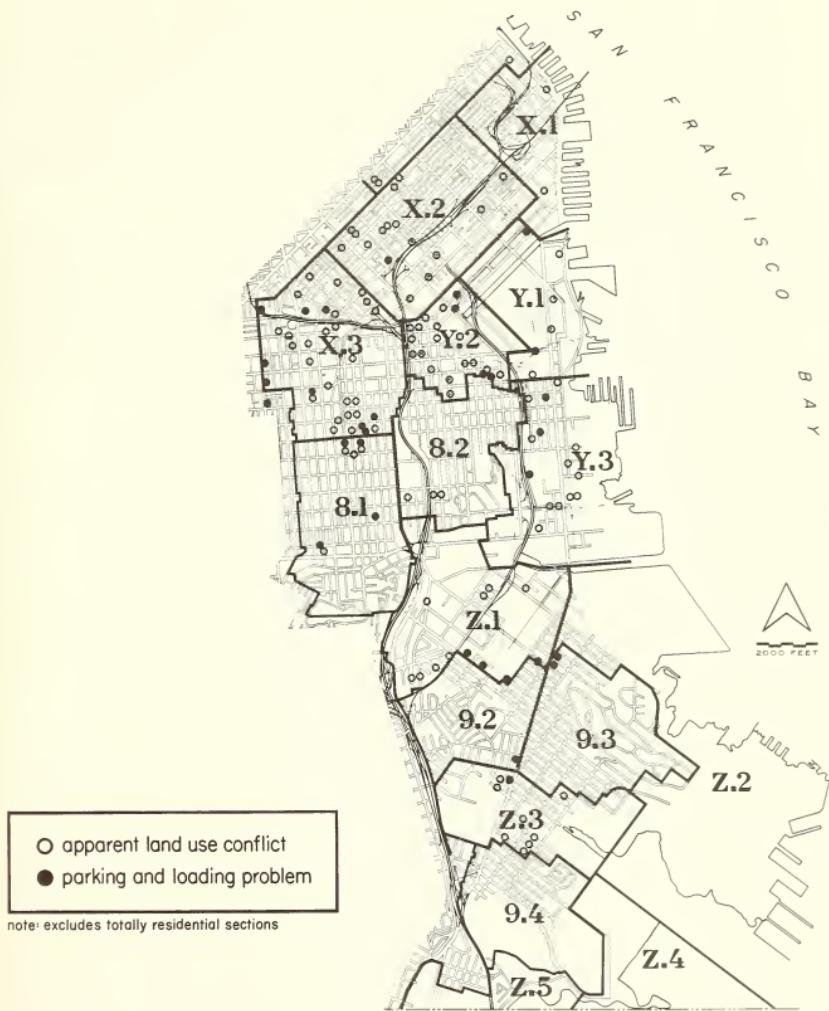


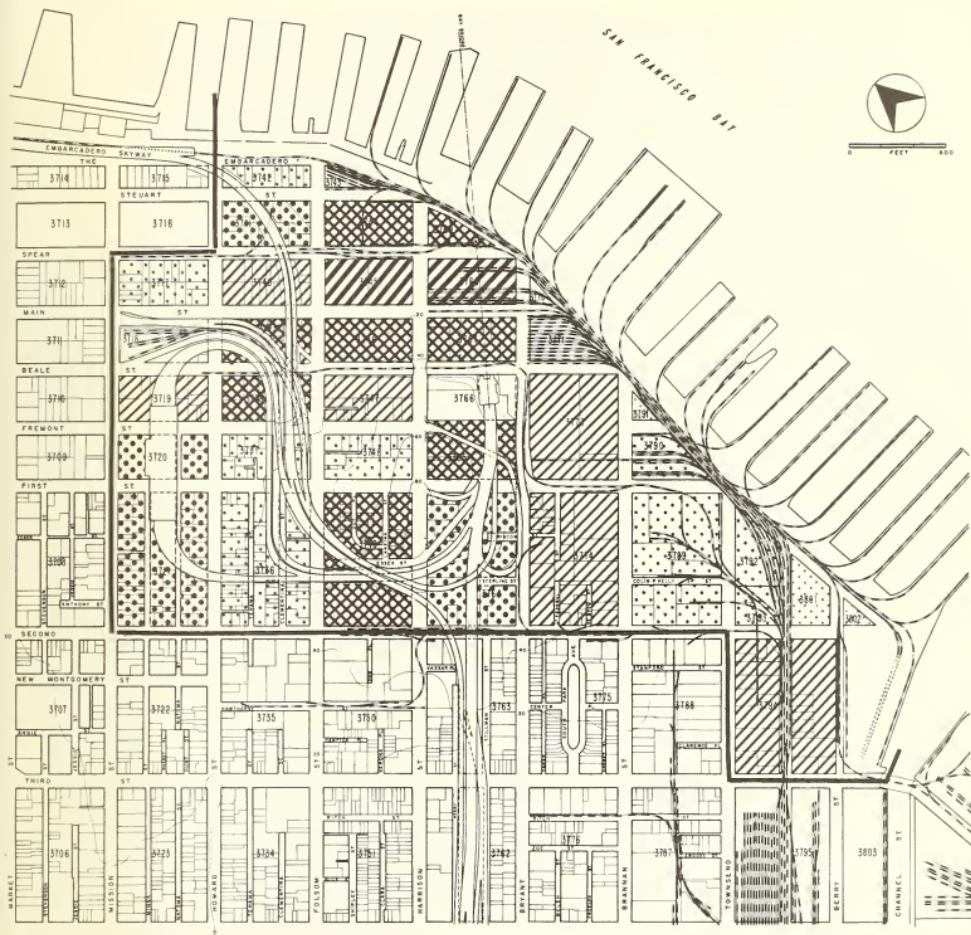












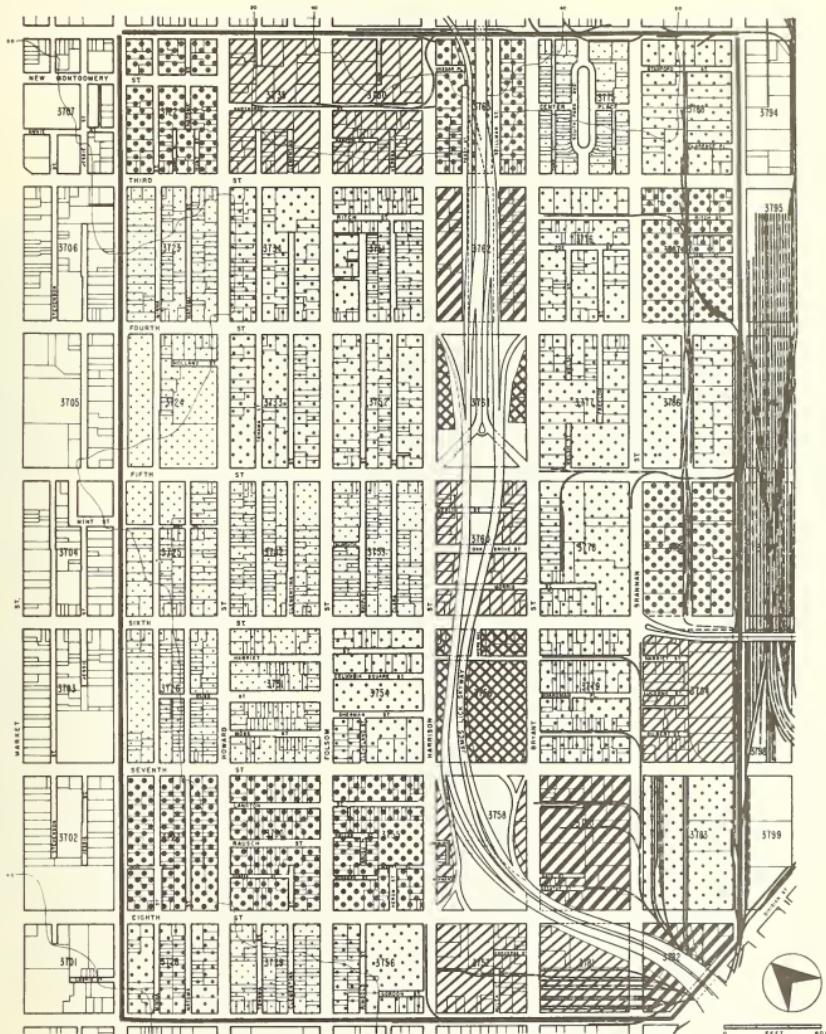
RINCON HILL

PLANNING AREA X-1

BEST

WORST





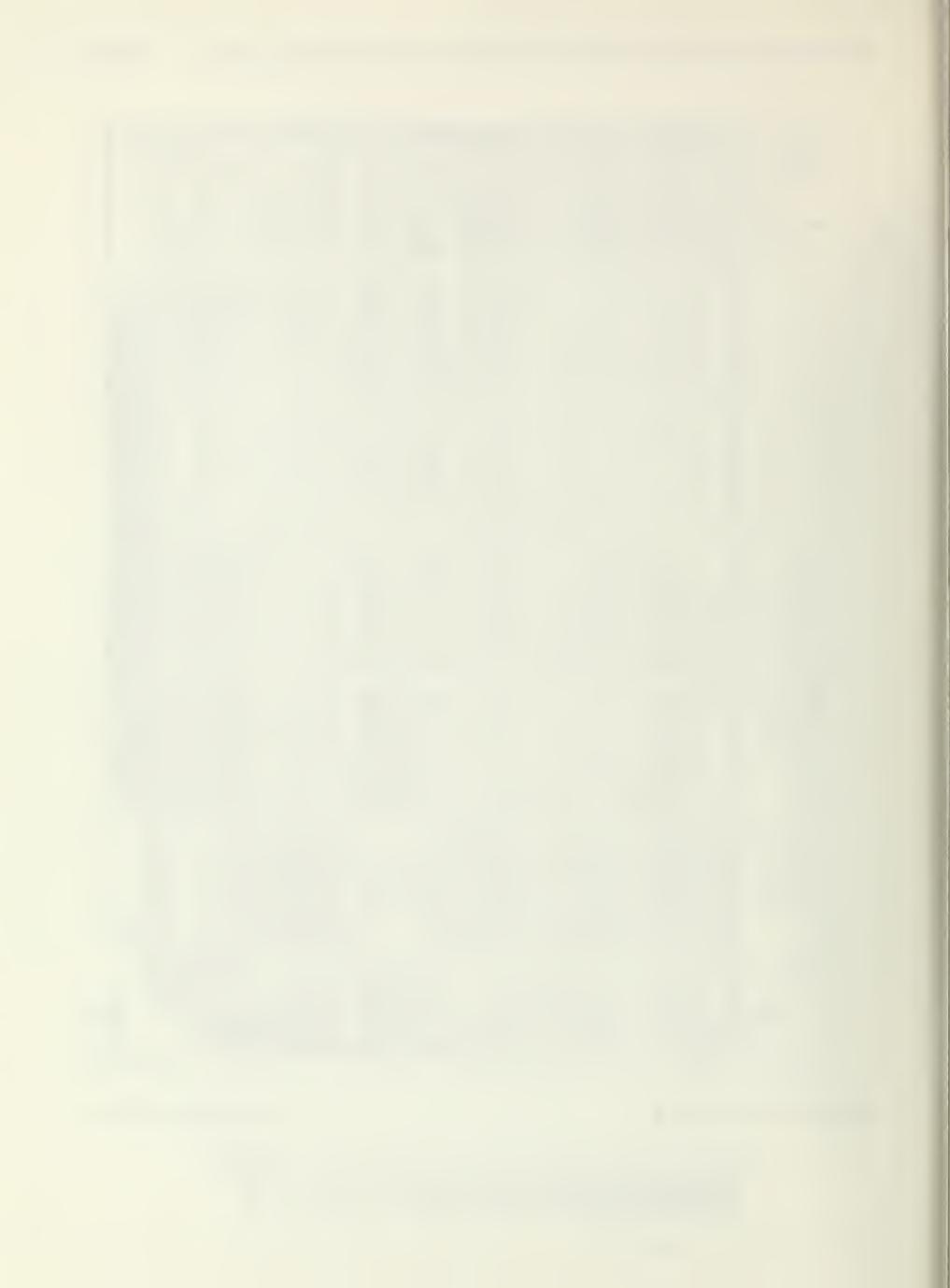
SOUTH OF MARKET

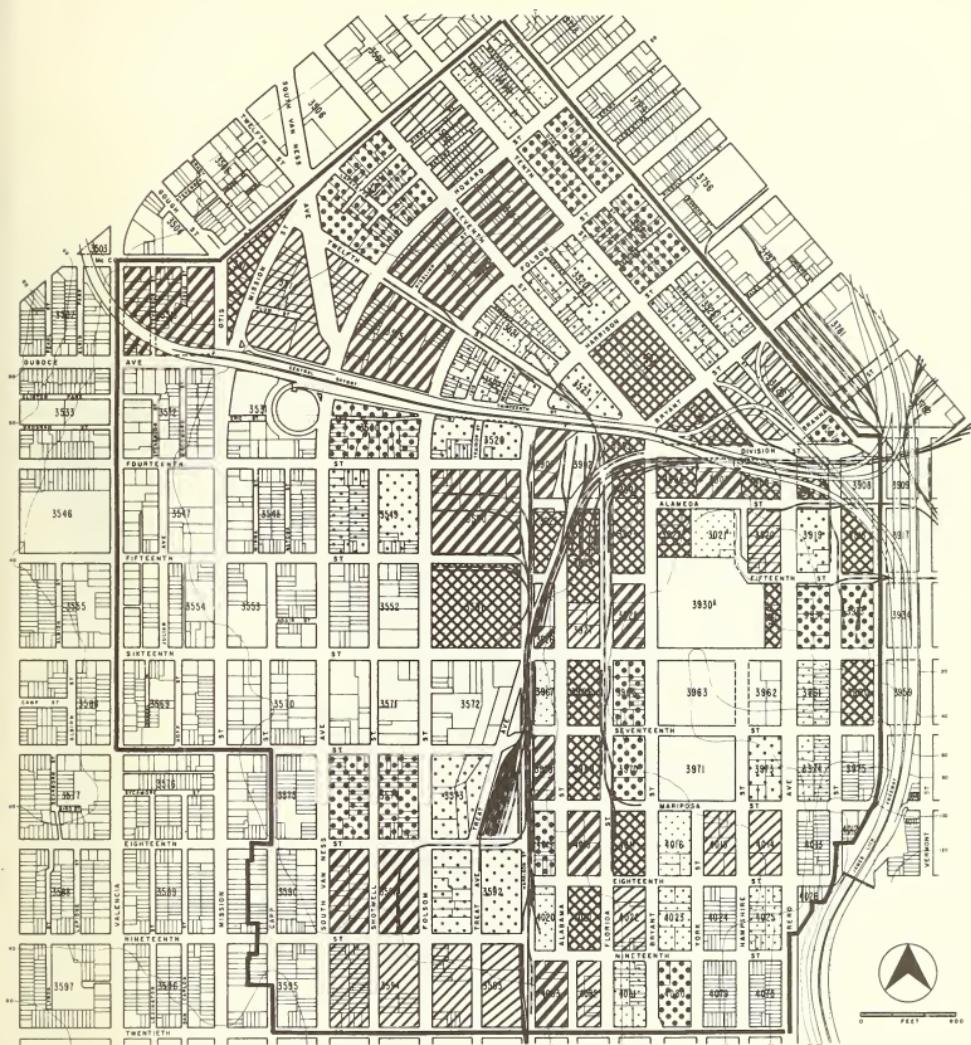
PLANNING AREA X-2

BEST



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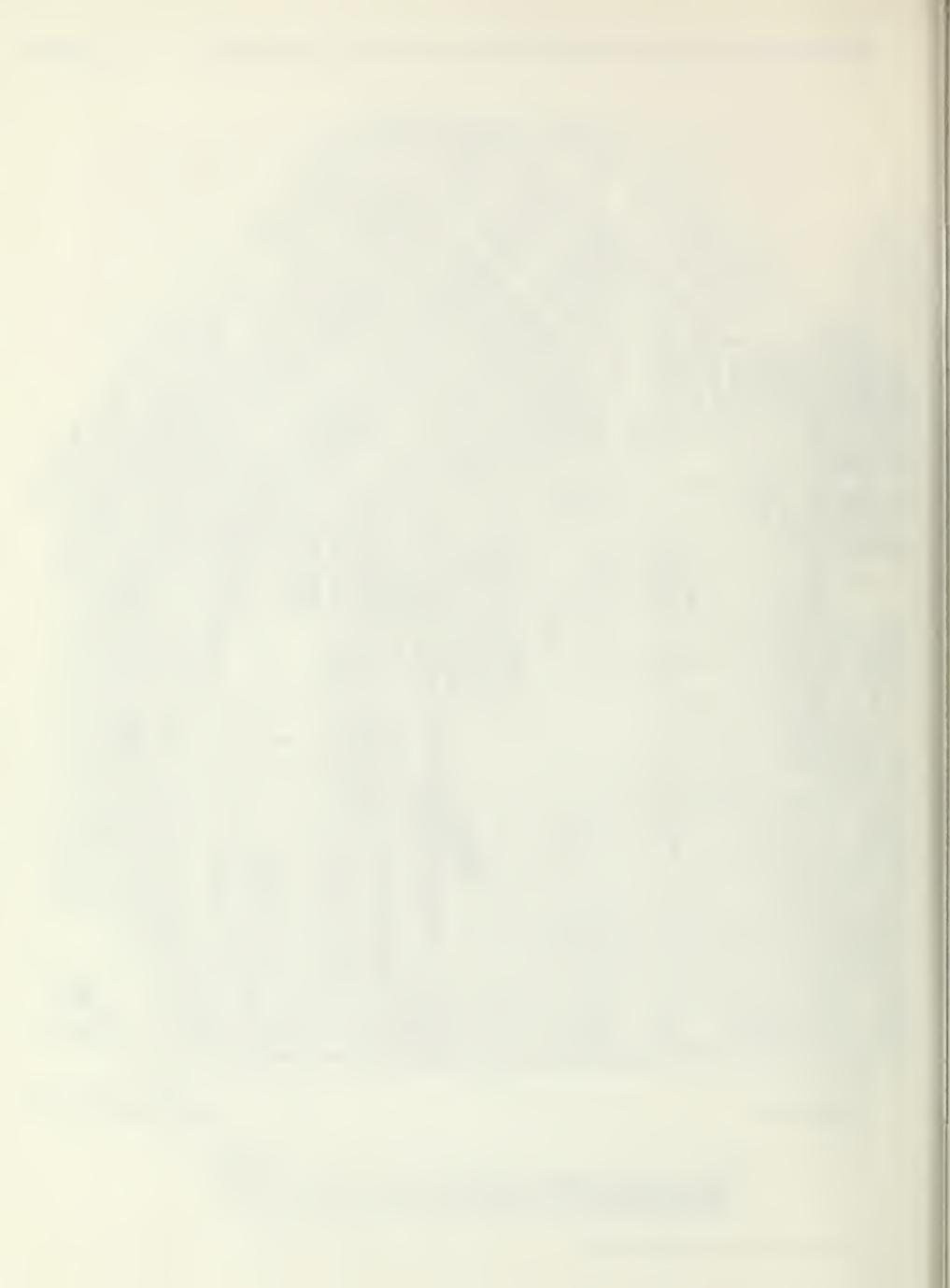
DIVISION

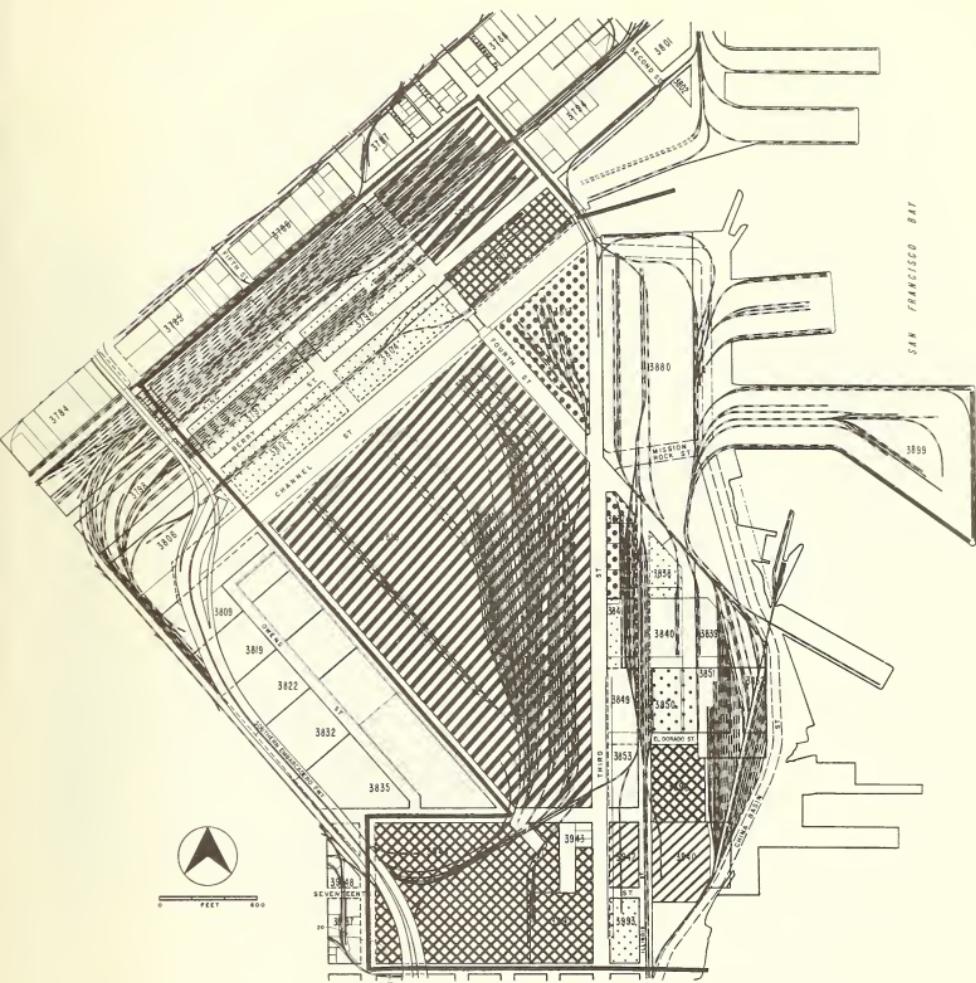
PLANNING AREA X-3

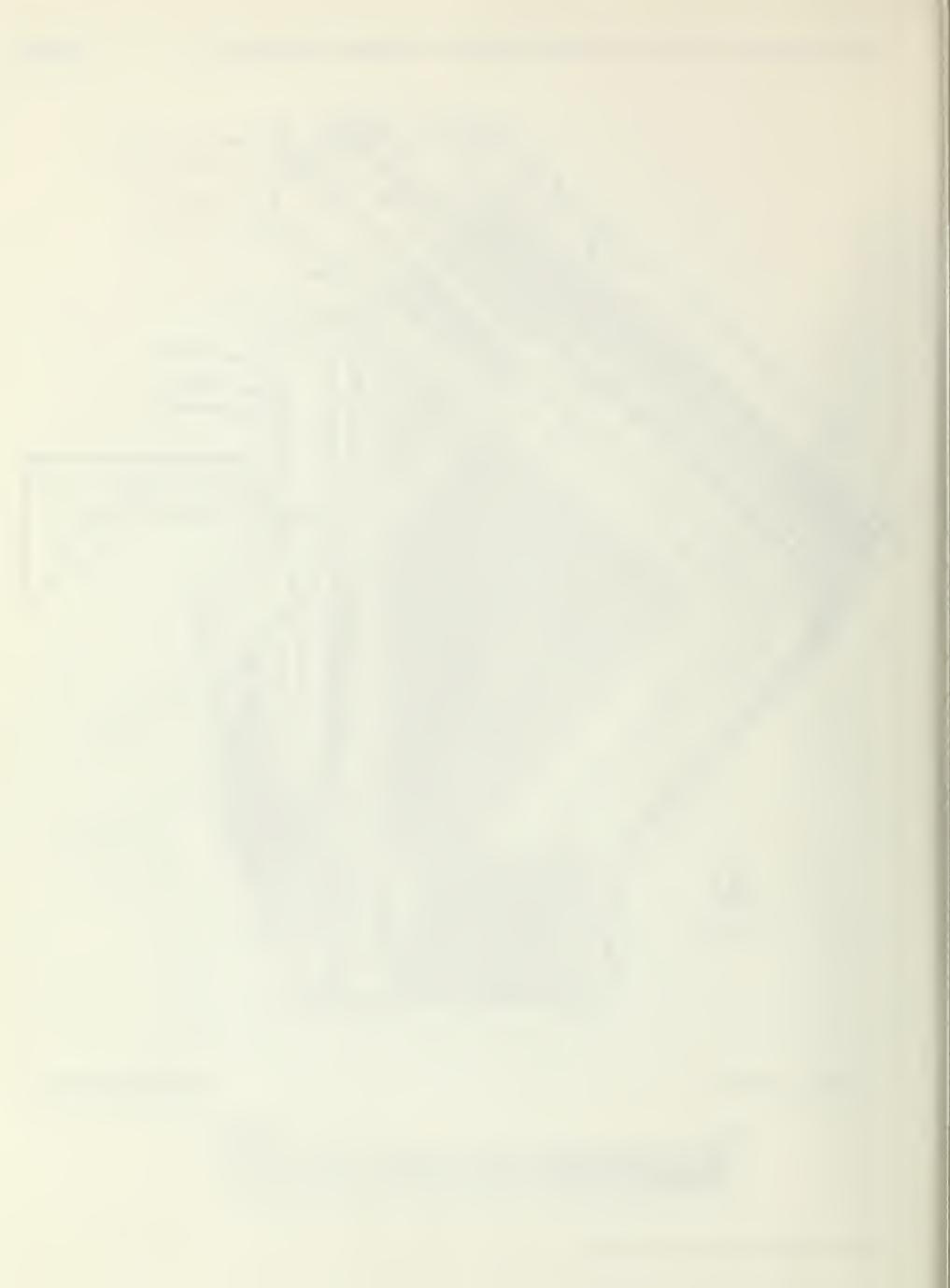
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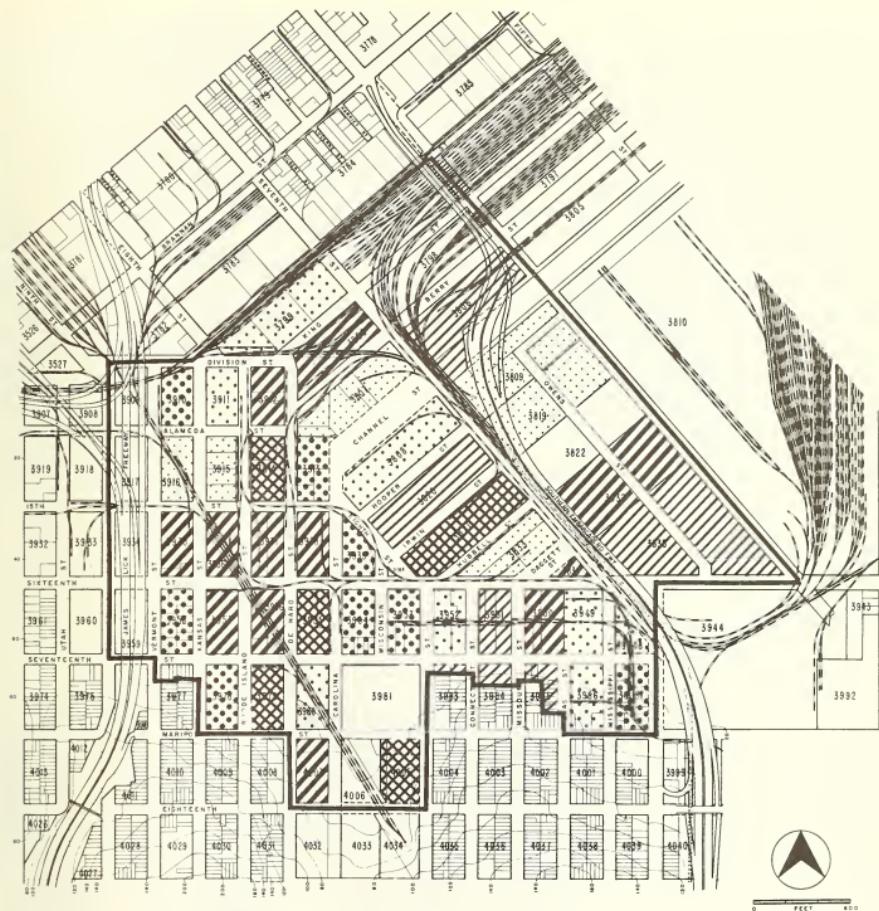


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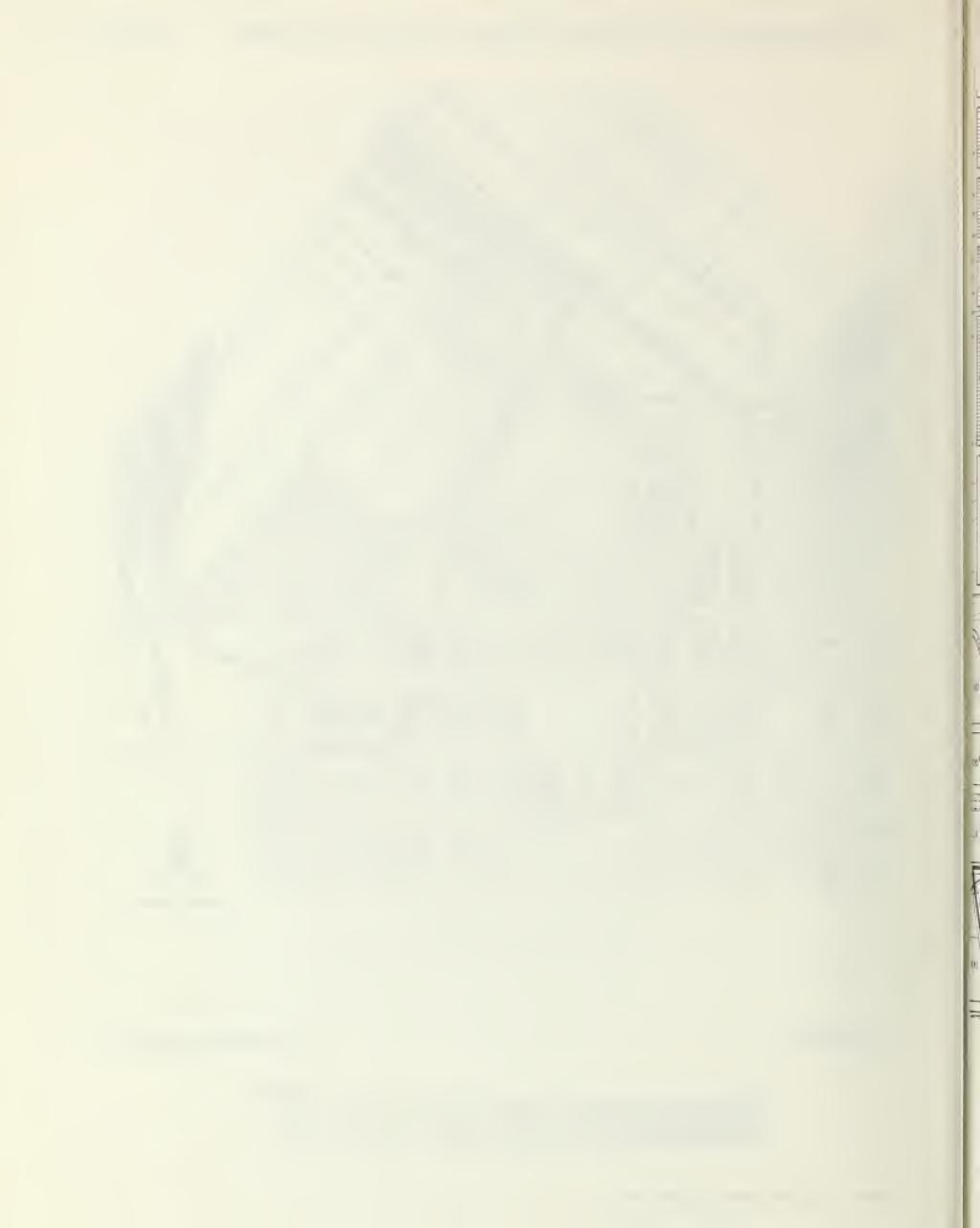
CHANNEL

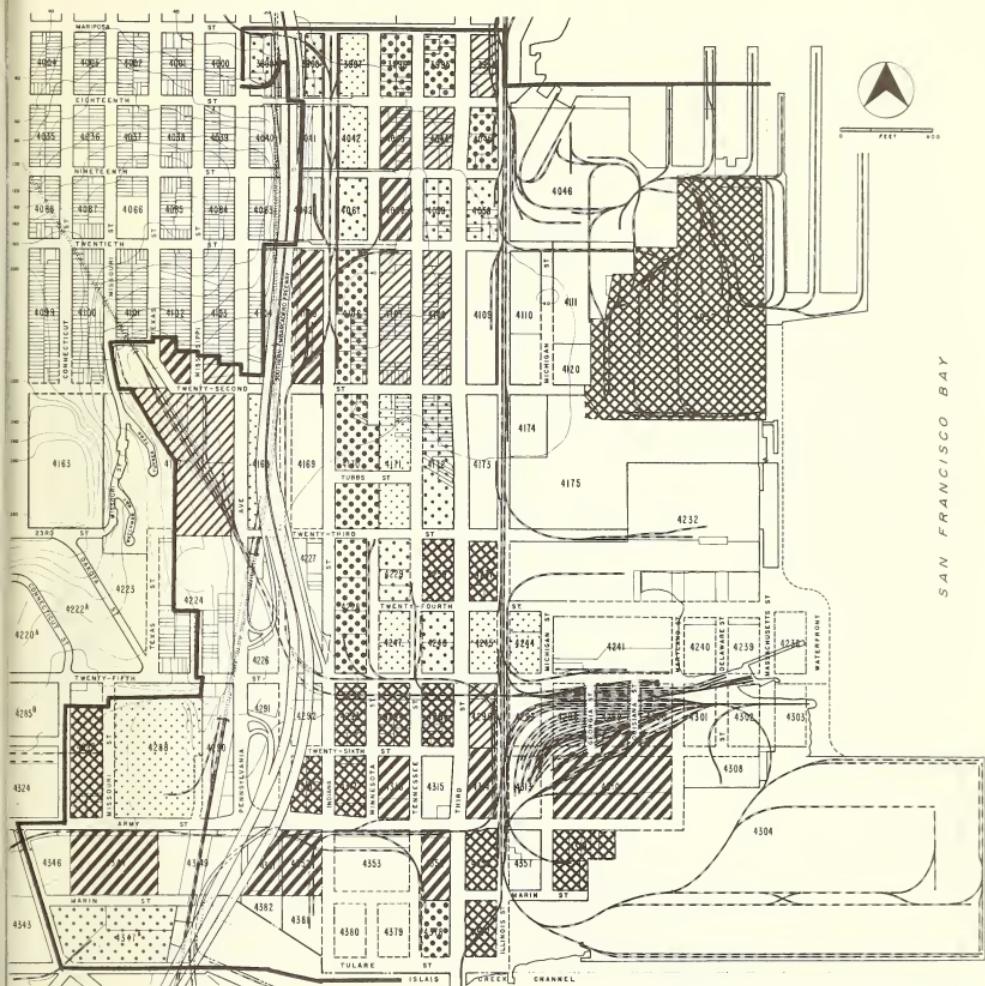
PLANNING AREA Y-2

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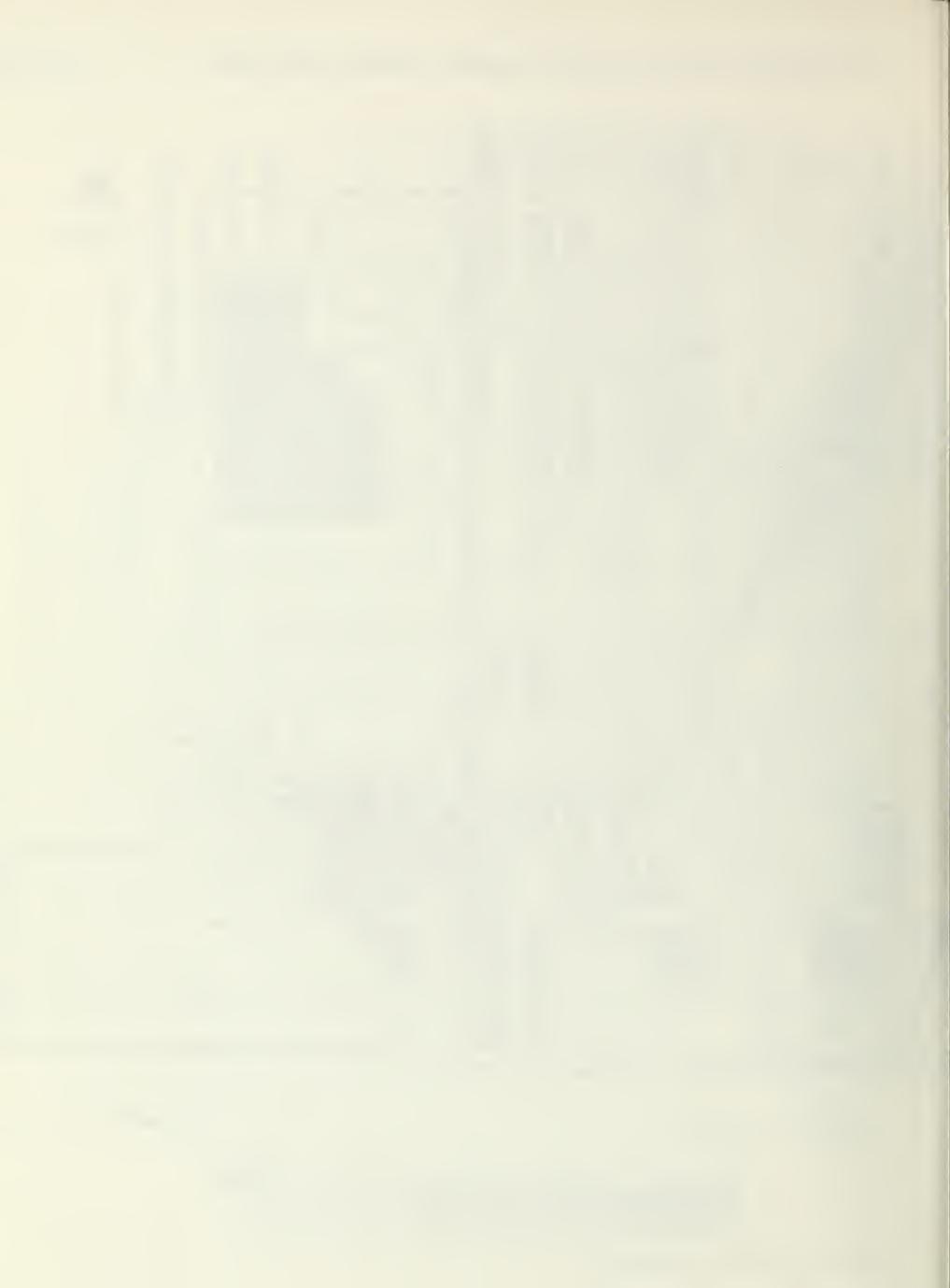
CENTRAL BASIN

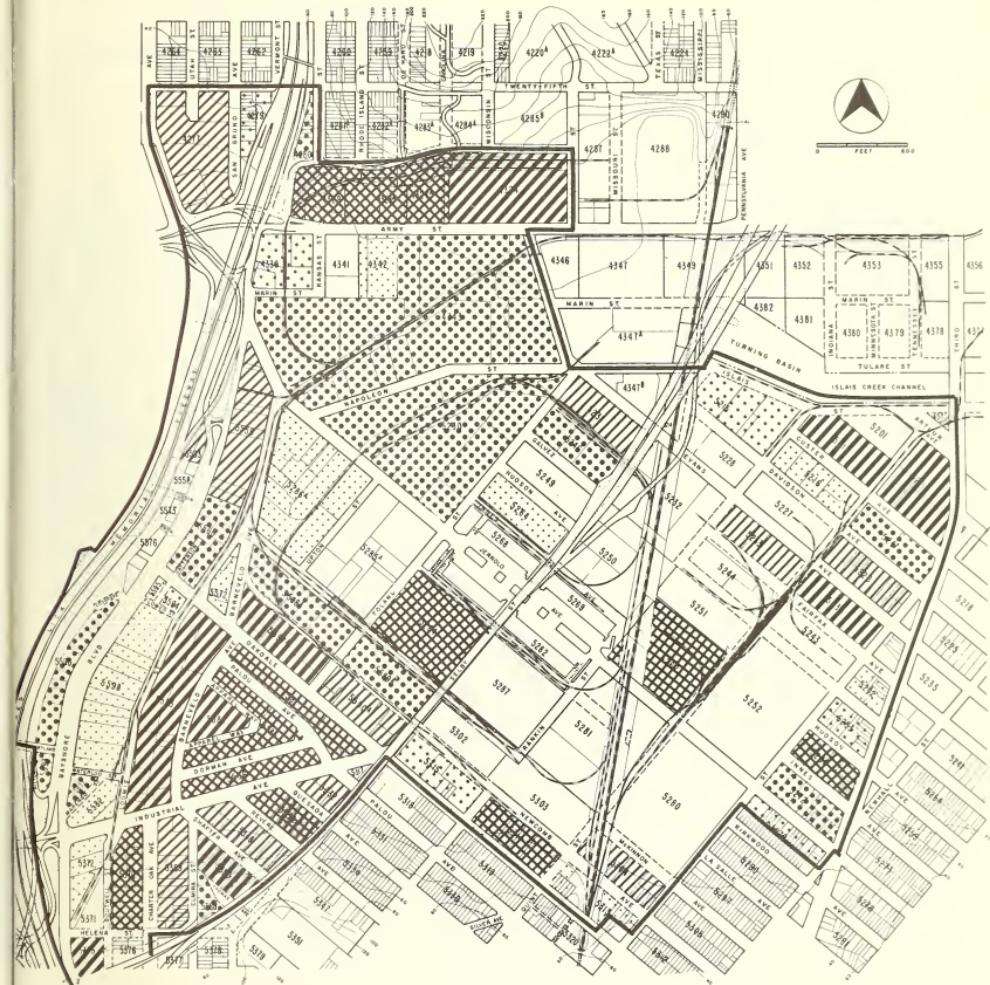
PLANNING AREA Y-3

BEST

WORST

Source: Community Renewal Program, 1965





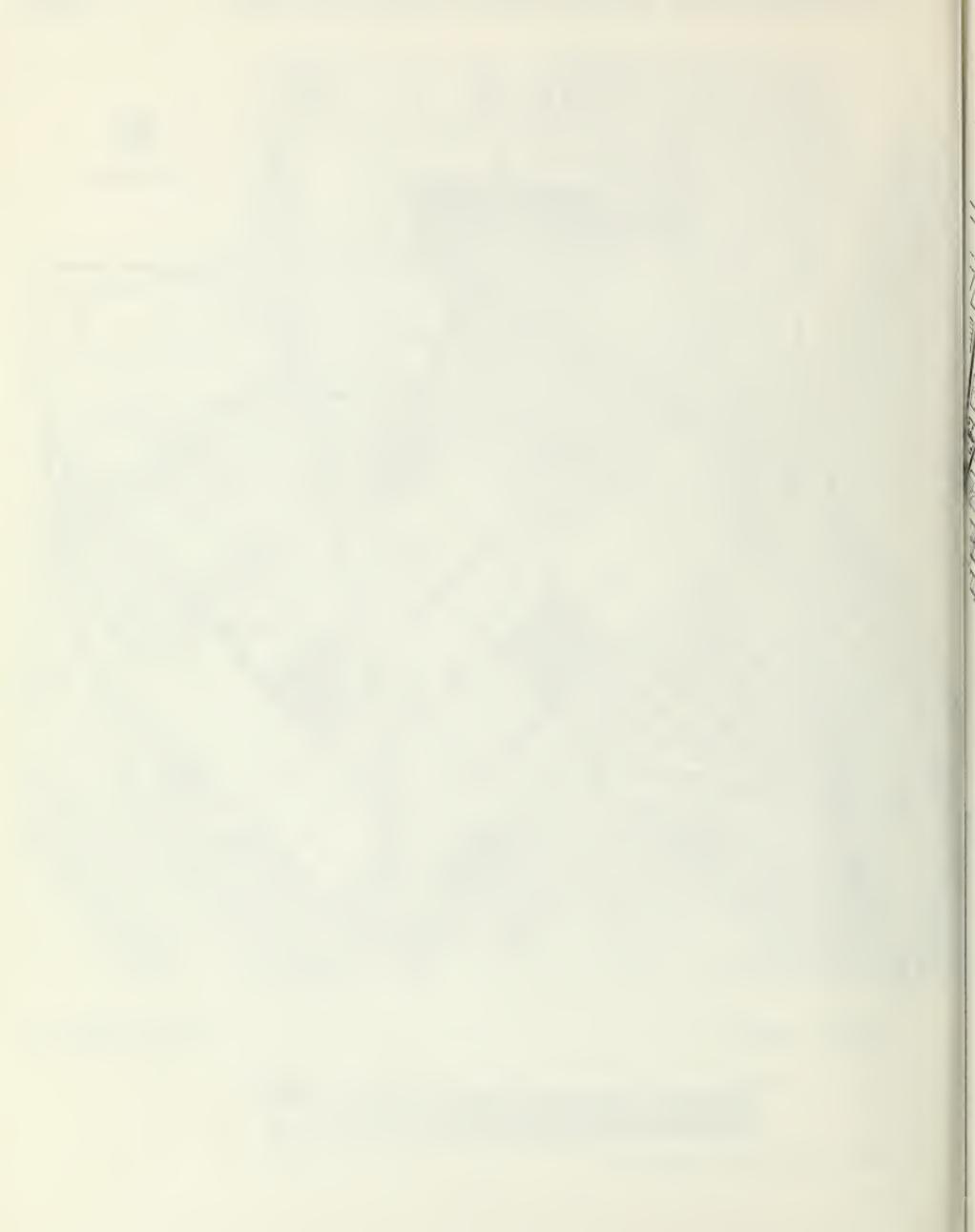
ISLAIS CREEK

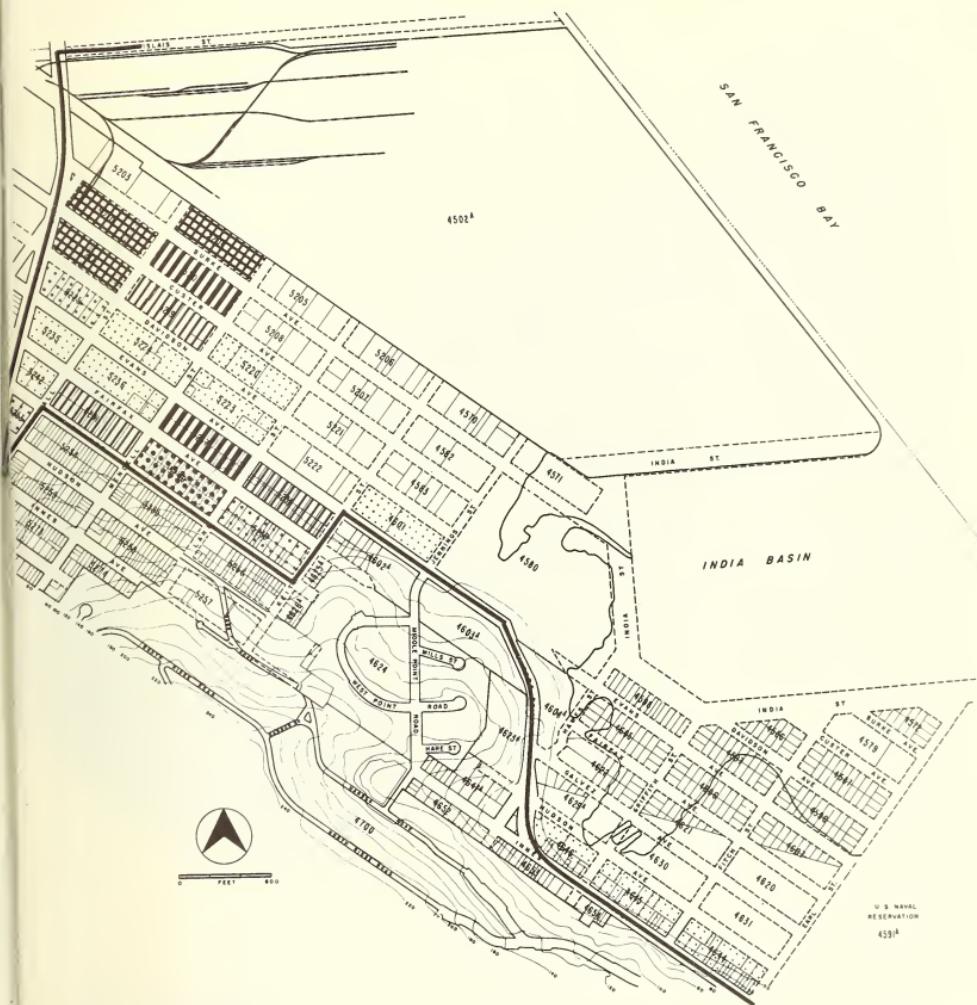
PLANNING AREA Z-1

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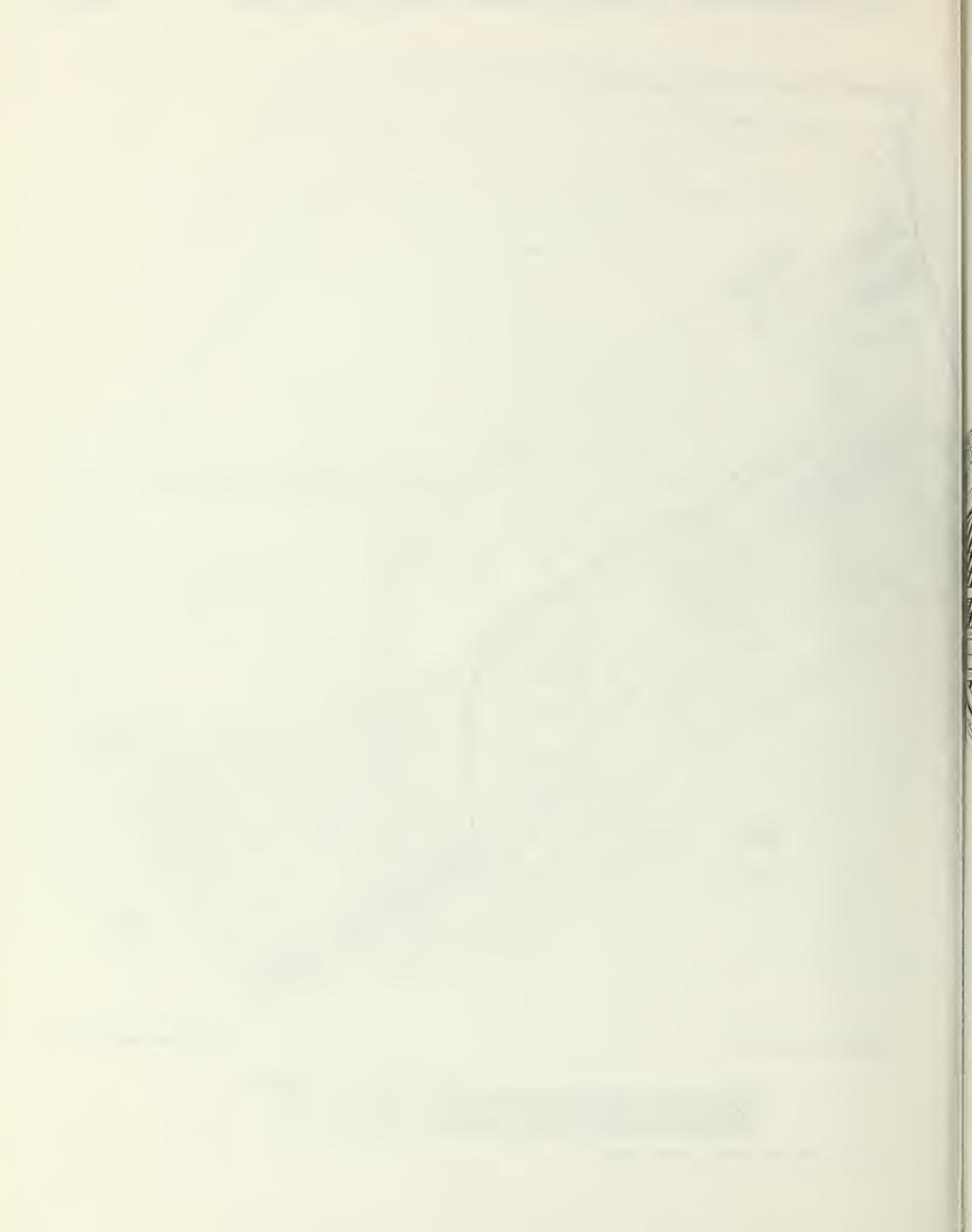
INDIA BASIN

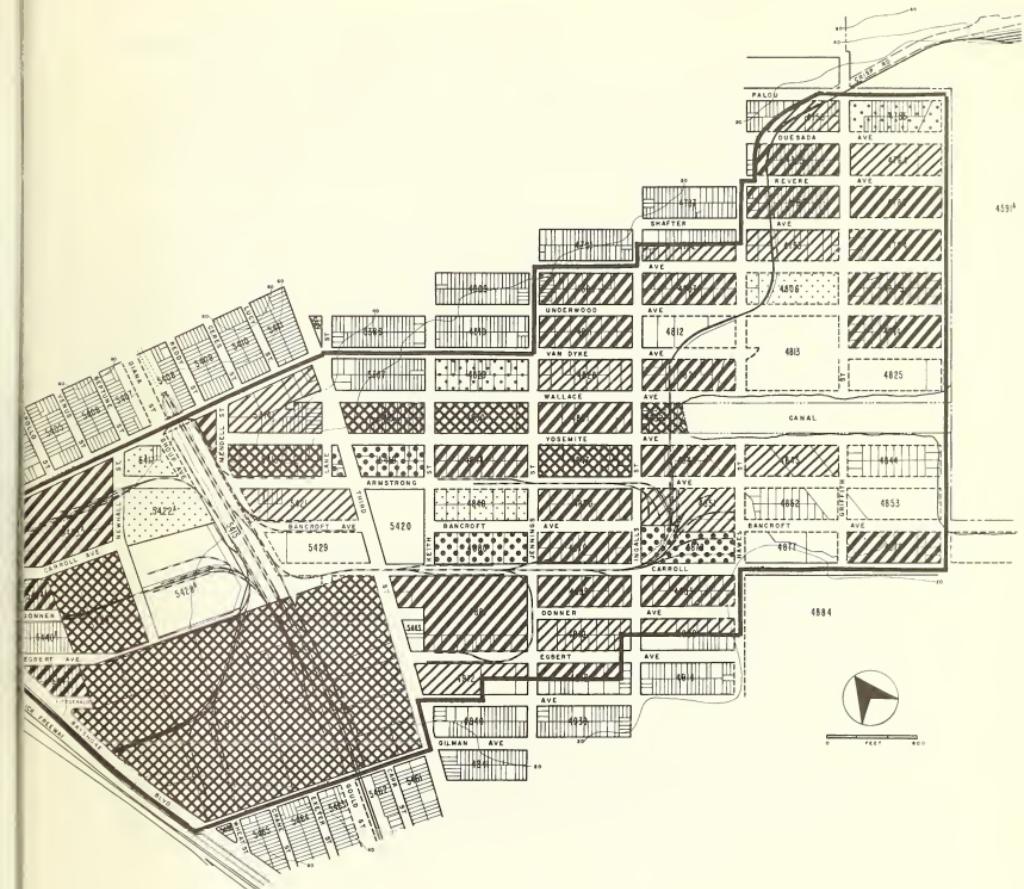
PLANNING AREA Z-2

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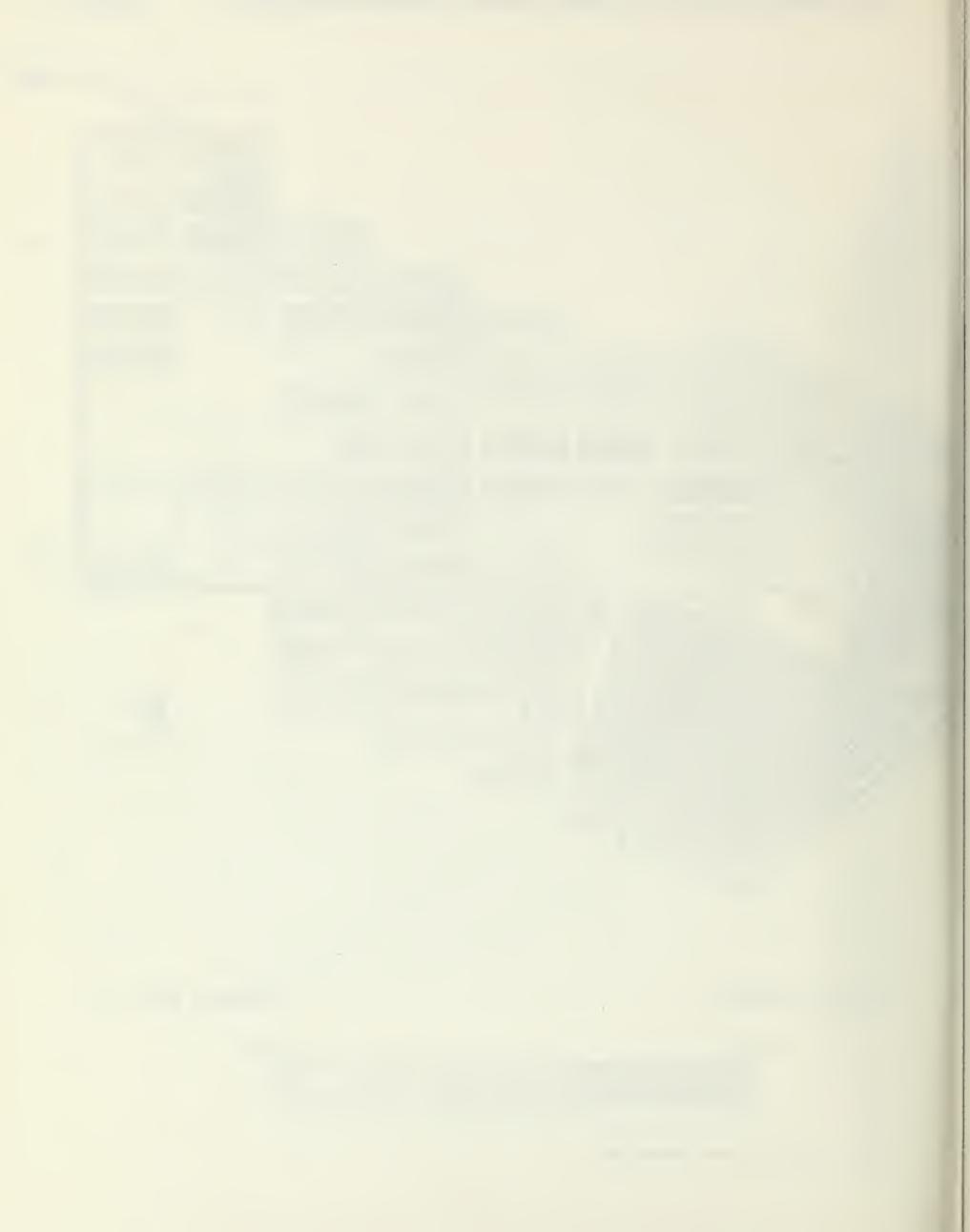
SOUTH BASIN

PLANNING AREA Z-3

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CONDITION OF UTILITIES AND STREETS

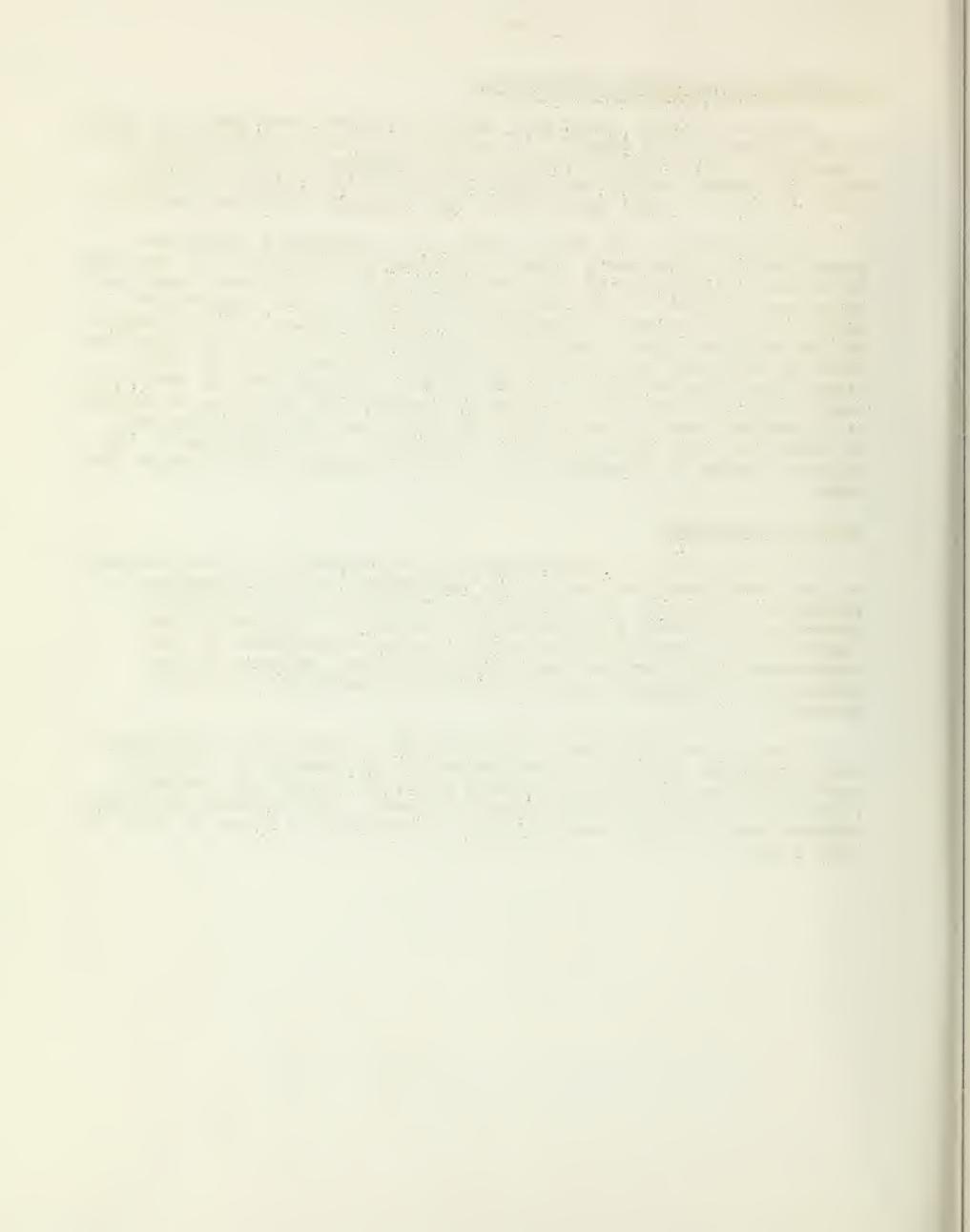
Maps of utility locations supplied by the Department of Public Works indicate that almost all parts of the major commercial and industrial area of San Francisco have adequate utility service. There are sewer, water and auxiliary water facilities reaching every section of this area except for certain shoreline locations.

The Department of Public Works has performed a condition survey which rates every street and every intersection in the city. In direct observation of the roadway system, a weighted numerical value was applied to the surface condition, visual appearance, sealability of cracks, rideability, traffic volume and the amount of use by mass transit vehicles. These numerical values were then used to establish an overall rating for the condition of each street and intersection. Review of this information for the study area indicates that, while there are scattered locations of streets and intersections in bad condition, there are no large sections of land with many such ratings. Generally, the condition of the roadway system is adequate and does not adversely affect other land uses.

GEOLOGIC CONDITION

In the course of development of the Community Safety Element of the Comprehensive Plan by the Department of City Planning, a geologic evaluation was performed in 1974 by the engineering consultant URS/John A. Blume and Associates. This background information is contained in several reports available at the Department, and includes maps showing seismic hazards in San Francisco and various types of possible damage due to those hazards.

Due to the fact that a good portion of the major commercial and industrial section of San Francisco is located on unstable land which was created by filling portions of the Bay, seismic condition is particularly important there. The various potential hazards are a major consideration in the use or reuse of land in this area.

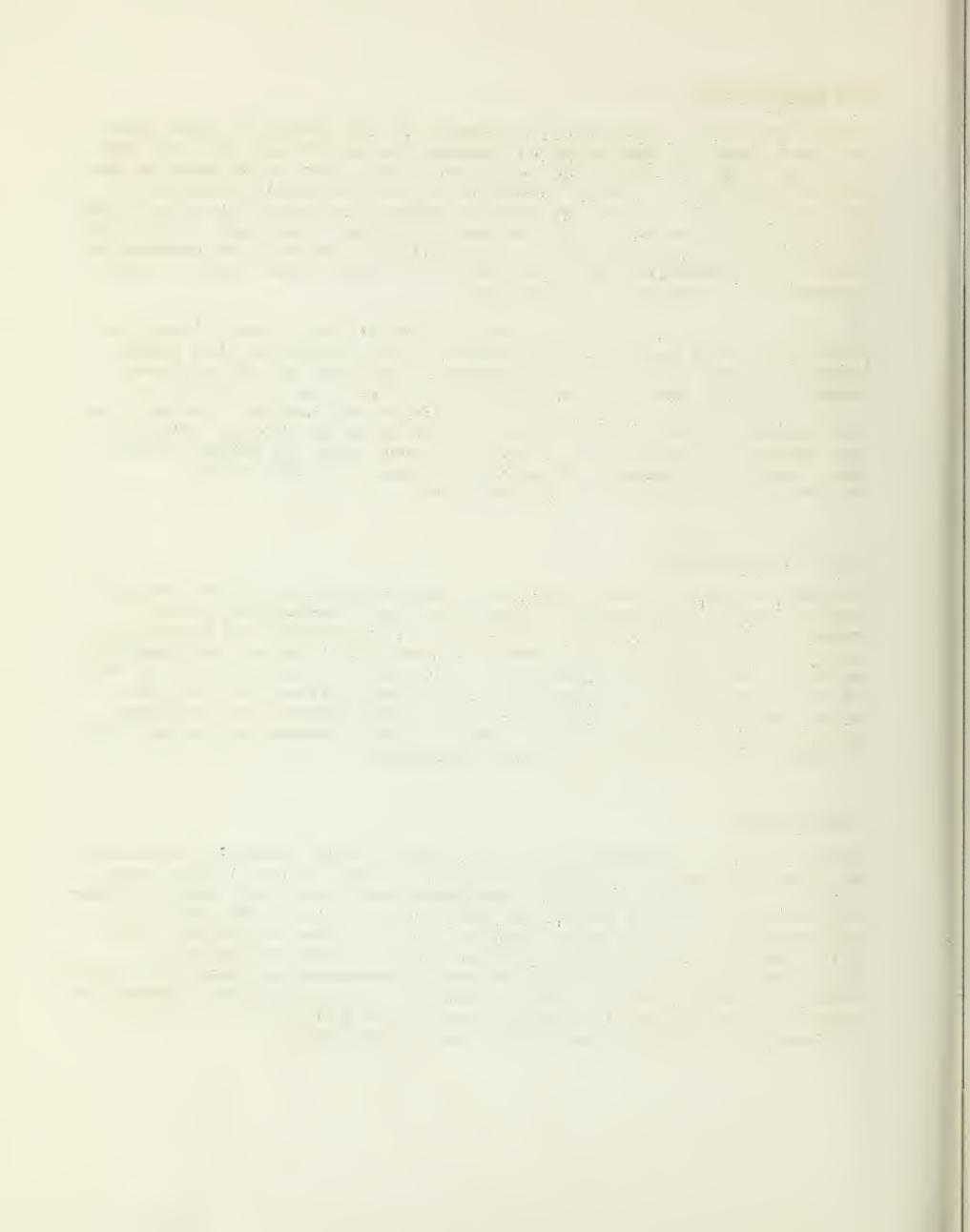


III. LAND-USE TRENDS

An important part of the background information necessary for formulation of land-use policy is a compilation of current trends in the industrial section of the city. These trends are identified in the report by the consultant to the Department of City Planning for the Commerce and Industry Element: "Commercial and Industrial Activity in San Francisco" by Arthur D. Little, Inc., June 1975.

The following are summaries of land-use trends for the industrial section of the city as they apply to each of the selected Planning Areas examined in the Field Observation Project. These summaries are based on observations by the Department of City Planning staff in addition to the Arthur D. Little report.

See Map 13 for location of Planning Areas.



Y.1 and Y.2 China Basin and Channel

This area, along the Bay between Townsend and Mariposa Streets, has been dominated by various transportation and manufacturing uses. Recent declines in the amount of land used for these sectors have been accompanied by an increase in land used for storage and business services. The waterfront in this area is in continued active maritime use.

Projections of land use for the future indicate continued low-intensity uses, including possible relocation of manufacturers from south of Market Street and other industrial uses from the Mission. New warehousing uses could occur in this area if low-cost facilities were made available. There has been a significant amount of rehabilitation of old buildings in the western portion of this area.

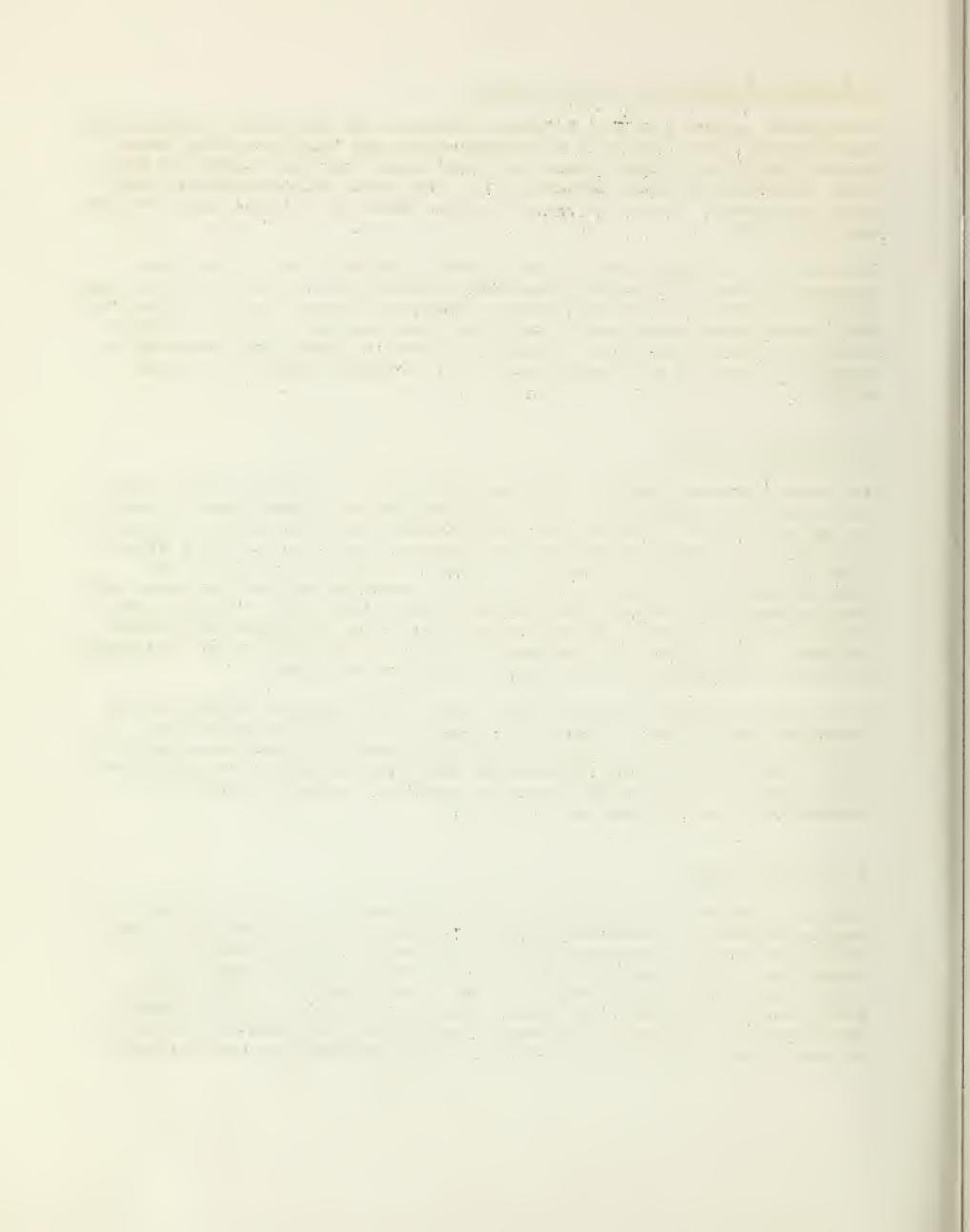
Y.3 Central Basin

The area between Potrero Hill and the Bay is a traditional location for heavy industry. With the decline of these uses in the city in general, this area has incurred considerable building vacancy, including the large American Can Company facility on Third Street from Twentieth to Twenty-third Street. There continues to be significant wholesaling, trucking and warehousing in the area, but the intensity of these uses has declined since 1960. Major maritime uses are located on the waterfront; the Bethlehem dry docks and ship repair are the largest of such facilities in San Francisco now that the Hunters Point Naval Shipyard is closed.

The future for the Central Basin area could include expansion of trucking facilities. Also, the vacant buildings provide the potential for reuse by industries displaced in other areas of the city. New warehousing facilities could be located in the Central Basin area, or buildings formerly used for industry could be converted to warehouse use.

Z.1 Islais Creek

The area between Third Street and I-280 south of Islais Creek is mostly devoted to manufacturing, trucking and warehousing. The Southeast Sewage Treatment Plant is a major utility use which is expanding. The leading trend in this area is abandonment of large manufacturing plants. It may be difficult to find reuses for these facilities, but there could be a need for additional warehousing. The area has been a principal location for open-air storage uses such as auto wreckers and construction contractors.

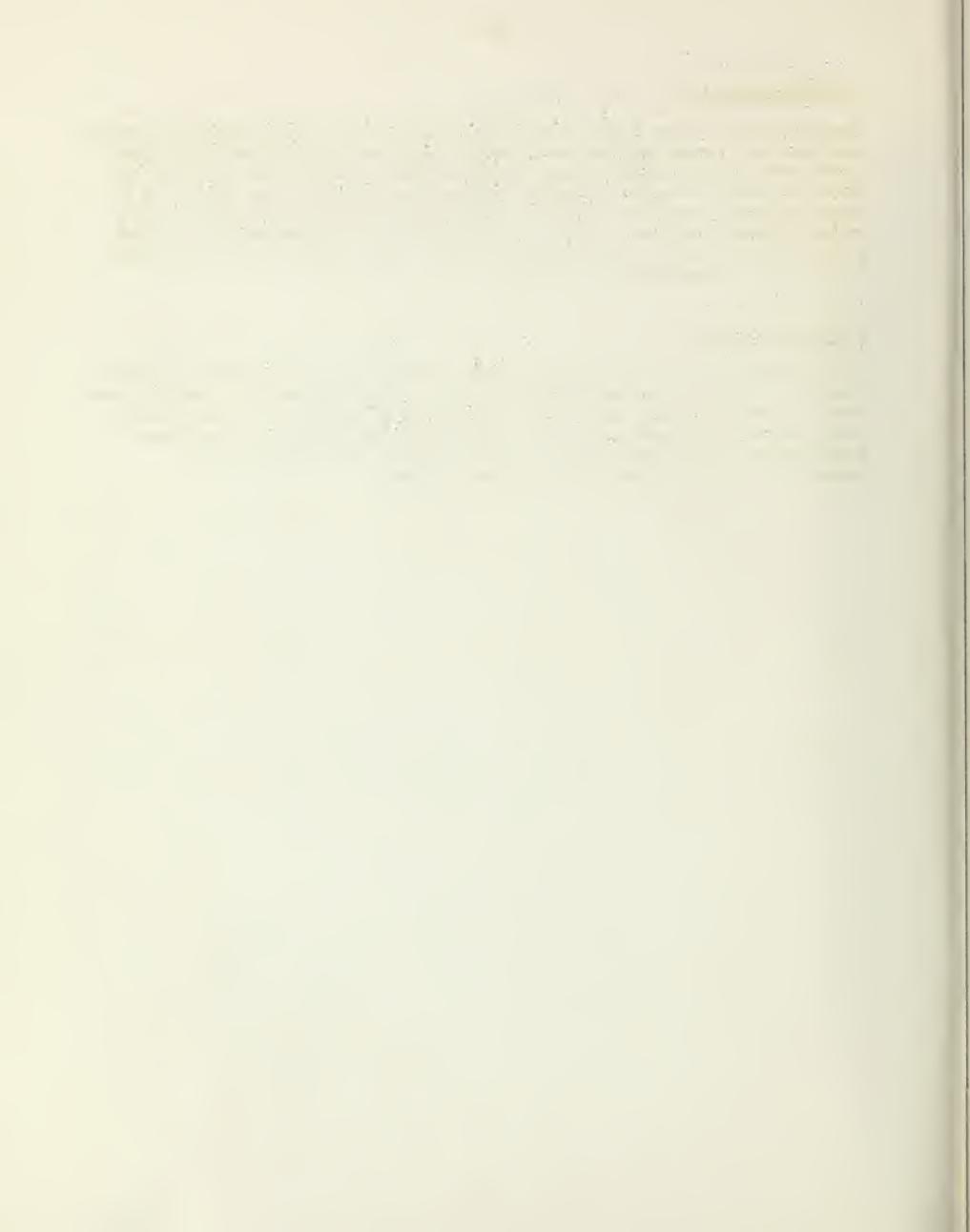


Z.2 India Basin

Manufacturing uses have declined in the area between Third Street and the Bay south of Islais Creek. However, maritime uses have increased with expanded Port facilities. A major portion of the area is used for open storage and salvage yards, and there is a considerable amount of vacant industrial land. The India Basin Redevelopment Project area is available for construction of new plants; it remains to be seen whether that area can be developed with labor-intensive land uses.

Z.3 South Basin

The industrial area on either side of Third Street north of Paul Avenue is mostly in manufacturing use. The major uses are to the west of Third, with the east containing a variety of small uses. Here again, there could be a significant demand for warehouse facilities, although this area may not be as attractive to potential users as nearby suburban areas.



ACKNOWLEDGEMENTS

CITY PLANNING COMMISSION

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AUTHORSHIP

This report was written by Charles T. Gill, Planning Coordinator, with the assistance of Robin Jones, Planner II of the San Francisco Department of City Planning.

INFORMATION RESOURCES

1964 Community Renewal Program: San Francisco Department of City Planning and Arthur D. Little, Inc., Planning Consultant

1970 Land Use Survey: San Francisco Department of City Planning

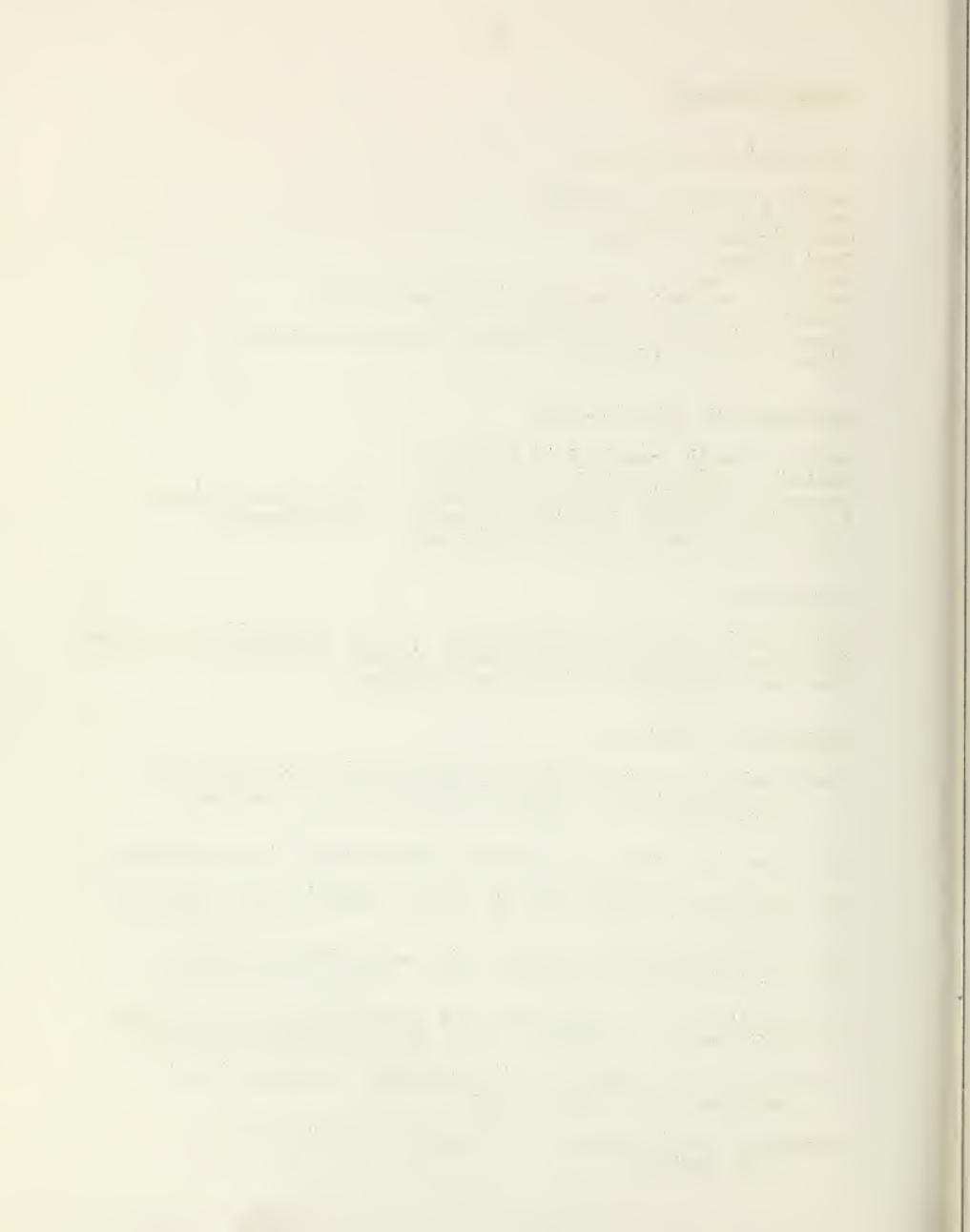
Data Analysis of 1970 Land Use Survey: Resource One, Community Computer Center

1975 Field Observation Project: San Francisco Department of City Planning

Consultant Report, "Commercial and Industrial Activity in San Francisco": Arthur D. Little, Inc., Planning Consultant

Utility Maps and Street Condition Survey: San Francisco Department of Public Works

Community Safety Element: San Francisco Department of City Planning



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